Epicor Commerce Connect Implementation Guide

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Contents

Part I: Introduction

Welcome to the Epicor Commerce Connect (ECC) Implementation Guide. This guide explains how to configure the Epicor Commerce Connect system to work with your ERP application and how to create an e-commerce site.

The guide covers such topics as initial setup, maintenance tasks, messaging setup and site appearance configuration. To install ECC and perform minimum configurations, use the Epicor Commerce Connect Installation Guide.

Epicor Commerce Connect (ECC) is an e-commerce connector and toolset developed, implemented, and supported by Epicor. It enables Epicor ERP customers to develop unique websites quickly and manage them easily, providing the necessary tools to deliver a rich customer experience, throughout the typical order life cycle - from quote to fulfillment, and beyond.

Fully integrated to your ERP system, Epicor Commerce Connect eliminates the need to maintain a separate product database and provides streamlined access to ordering, product or account information including customer specific pricing, inventory levels, marketing and customer service processes - all in real-time using ERP data that can be viewed online via Epicor Commerce Connect.

ECC supports the Magento eCommerce platform and provides a scalable solution that is backed by an extensive support network and allows you to build a site to help fit your unique business needs.

The functionality you can use in ECC depends on the type of licence you have. ECC provides three types of licenses:

1. **Consumer Connect** - If your business involves serving a direct-to-consumer channel, ECC provides the tools and framework to engage them online. In addition to all of the general features listed above, Consumer Connect provides specific features for selling online to consumers and supports the following:
   - Guest and account login
   - All B2C transactions are associated with a default ERP account controlled on a site by site basis
   - Open site allowing browsing before login
   - Anonymous checkout
   - Sophisticated message caching for B2C performance enhancements
   - ERP payment via payment gateways. For example, Epicor ERP 10 can collect the payments with Epicor Secure Data Manager (ESDM) and Prophet 21 can use the Elements payment gateway; in both cases the website displays a page and collect the consumer card details for processing by the ERP
   - Instant payment–this payment type covers several payment choices

2. **Customer Connect** - Business customers have expectations that are influenced by all online experiences, so they require the same ease of use provided by top consumer websites. Additionally, they will have other requirements such as being able to view special promotions, price lists, invoices, orders, RMAs,and shipments, make repeat purchases and pay on account. Epicor Commerce Connect has been built especially with these requirements in mind and provides frictionless purchasing from your B2B customer website.

3. **Supplier Connect** - Epicor Commerce Connect can also provide a website for your suppliers, providing online self-service on a whole range of inquiries, such as open orders, part information and access to invoice and payment history. This is one way to reduce or eliminate time spent on enquiries that come in via email, phone, or fax, and can significantly increase the amount of time workers have to spend on other tasks. Supplier Connect creates a more seamless relationship between you and your suppliers, and allows for your business to react much more quickly and accurately to any change of circumstances.

Part II: Configuration Tasks

Use this section to configure primary elements in Epicor Commerce Connect, prepare your ERP data for upload, and synchronize it with ECC.

Chapter 1: Prepare ECC for Data Upload from your ERP

Use this section to configure ECC to upload the entities from your ERP system.

When data is uploaded from the ERP system, it needs to be mapped into the ECC standards. ECC uses data mapping to convert all incoming data into a standard Magento/ECC format, and to convert all outgoing data into the correct ERP format.

Some data mapping does not depend on the settings within Epicor Commerce Connect. For example, not all addresses uploaded from the ERP are validated. Thus, if your web site supports US customers, the data uploaded from the ERP system must have a valid state assigned. All addresses also require a valid country.

All individual settings can be altered in ECC Admin Panel.

1.1 Site Settings

Before data is imported into ECC, you need to decide on the structure of your e-commerce solution. ECC can support many different web sites within a single installation. Determining which products are available on which site is a combination of the site currency and the brand settings for the site.

Note For information on how to create and deploy an ECC site, create a store and a store view, refer to the Post Installation > Create New Site section in Epicor Commerce Connect Installation Guide.

1.1.1 General Locale Properties

Use these steps to define the site options for local and store information.

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, under the **General** title, click **General**.
2. Use the Countries Options section to define the country where your business is located and the countries from which you accept payment. :
   a. Enter a **Default Country** to use for billing and shipping addresses.
   b. In the **Allow Countries** list, select each country from which you accept orders. By default, all countries in the list are selected. Use **Ctrl-Click** or **Shift-Click** to select additional countries that can be selected for the billing and shipping addresses.
   c. In the **Postal Code is Optional for the following countries** box, select countries to which you ship that do not require a postal code to be collected during the checkout process.
   d. The **European Union Countries** box has the countries which belong to European Union selected. You can edit this list if needed.

3. Define States Options:

Note In many countries, the state, province, or region is a required part of the address. The information is used to enter shipping and billing information, to calculate tax rates, and so on. For countries where it is not required, the field can be omitted entirely from the address, or included as an optional field.

As standard address formats vary from one country to another, you can also edit the address template that controls how the information appears on documents such as invoices and packing slips.

a. In the **State is required for** list, select all the countries where you want the State to be a required entry. Use **Ctrl-Click** or **Shift-Click** to select multiple countries.

b. Set the **Display not required State** field to one of the following:

- **Yes:** In countries where the state field is not a required, your customers can optionally enter the information.
- **No:** In countries where the state field is not a required, the field is omitted from the form.

4. Use the Locale Options section to determine the language, country, tax rate, and other settings used throughout your store.

a. Set the **Timezone** in which the web store will appear to be located.

b. Define the **Locale** as a language that is supported by this store view.

c. In the **First Day of Week** field, indicate the starting day of week in your area.

d. In the **Weekend Days** list, indicate which days are considered weekend days in your area.

5. Click the **Save Config** button.

1.1.2 Brand Settings

Use these steps to define the brand settings at a site level, and if required at an individual store level. As a minimum the site should always refer to the ERP company it is related to.

Note For information on how to create and deploy an ECC site, create a store and a store view, refer to the Create New Site section in Epicor Commerce Connect Installation Guide.

Important The xVP application do not require Brand Settings.

Menu Path: Admin Panel > System > Manage Stores

1. In the **Website Name** column, select a website for which you want to define brand settings.

2. In the **Brand information** section, enter the name of the **Company** within your ERP that you want to associate with the website.

3. You can also specify the **Site**, **Warehouse** and **Group** you want to associate with the website. To decide whether you need to do this, review the following information:

- **Site** - in ECC this is a subdivision of the company you use. In your ERP it may be referred as a plant, branch, location and so on. You should use this property if you want to associate only one sub-division of your company with the ECC website to narrow down the amount of data transferred to ECC.

- **Warehouse** - use this property if you need to specify only one location from where physical goods are dispatched.
- **Group** - use this property if you need to associate a smaller unit in the hierarchy of your company with the ECC website.

4. Click the **Save Website** button.
5. Define Brand Settings for all your active sites.

1.1.3 Global Options

As the site user adds items to their basket and checks their cart, ECC can communicate with the your ERP system. Some information, such as a delivery address or shipping method, is not defined before checkout.

Use these steps to set up default delivery and shipping methods to be used by the Basket Valuation Message (BSV).

Menu Path: Admin Panel > Epicor > Messaging > Request Messages

1. Expand the **Global Options** section.
2. In the **Default ERP Delivery Code** field, enter a valid ERP freight code used by the ERP system for freight calculations.
3. Enter **Default ERP Address Code**. Typically this is 0 or 000. The system uses this value as a default freight code for BSV when user does not have a freight option selected during checkout.
4. Optionally, define a **Default ERP Address Country**.
5. Click the **Save Config** button.

1.1.4 Networking Options

Use these steps to define the site networking options such as timeout details, Simple Object Access protocol (SOAP) message usage and Current Network Status.

Menu Path: Admin Panel > Epicor > Networking and General

1. Expand the **Networking** section.
2. In the **Timeout** field, enter the connection timeout period. Typical value is 20-30 seconds. This controls the time that ECC waits for response from the ERP system before assuming that the ERP is unavailable. The system usually responds in 100 milliseconds, however sometimes the response can take longer, especially on busy sites with limited numbers of ERP web service licenses.
3. Select if you want to **Use SOAP** wrapper on messages to this ERP. Enter SOAP version to use in the **SOAP Ver** field.

   Important You can only use SOAP for the Tropos ERP system.

4. Use the Current Network Status section to manually change the online status of a site. For example, if you do not want to allow checkout when your site is offline, set the **Checkout disabled when site offline** to **Yes**.

5. When complete, click **Save Config**.

1.1.5 Site Currency

When ECC imports customers and products, it uses the site currency information as well as the brand information to see if that customer or product should be associated with a site. Use this section to set up the site currency.

Menu Path: System > Configuration General

1. In the **Configuration** pane, under the **General** title, click **Currency Setup**.

2. In the **Base Currency** field, enter the currency to use for all online payment transactions.

3. In the **Allowed Currencies** box, select the currencies which customers select to view the prices of items. Prices in allowed currencies are based on the currencies exchange rates to the base currency.

4. Click the **Save Config** button.

1.1.6 Shipping

Use these steps to define the shipping methods you want to use and to map them to the appropriate ERP Codes.

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, under the **Sales** title, click **Shipping Settings**.

2. Use the **Origin** section to enter the point of origin for shipping calculations.

3. Click the **Save Config** button.

4. In the **Configuration** pane, under the **Sales** title, click **Shipping methods**.

5. Enable each shipping method as required.

6. Click the **Save Config** button

7. Map each shipping method to the code that must be used in the ERP system:

   a. Navigate to **Admin Panel > Epicor > Quick Start**.

   b. In the **Checkout Settings** pane, click the **Add button** against **Shipping Method Mapping**.

   c. Enter the **ERP Code** that is used for a shipping method.

   d. Select the **Shipping Method** that will use this ERP Code.

   e. Continue to add ERP codes until all enabled Shipping methods are mapped.

   f. Click the **Save** button.

For more information on how to set up Quick Start screen, refer to the Epicor Commerce Connect Installation Guide.

1.1.7 Transactional Emails

Use the Transactional Emails functionality to create the templates of the emails for the system to send to the customers on different transactions. For example, you can use these templates for Sales Emails, Contact Us emails, Welcome Emails and so on.

Use these steps to create transactional email template.

1. In Admin Panel, navigate to **System > Transactional Emails**.
2. Click the **Add New Template** button at the top of the page.
3. In the **Template** field, select the type of email template you want to create.
4. Select the **Locale**.
5. Click the **Load Template** button. The system loads a base template for the type of email you chose.
6. Enter the **Template Name**.
7. Adjust the **Template Subject** and the **Template Content** according to your company standards. The required format for the mail content is HTML. You can also insert variables in the template. To do this, place the cursor in the template where you want to add a variable, click the **Insert Variable** button, and then select a variable to add.
8. Optionally, adjust the **Template Styles**.
9. Click the **Save Template** button at the top.

1.1.8 Terms and Conditions

Terms and Conditions are displayed at the end of the checkout process and provide customers with checkout information or specific terms. Use these steps to create and activate checkout Terms and Conditions.

Menu Path: Admin Panel > Sales > Terms and Conditions

1. Click the **Add New Condition** button at the top of the page.
2. Define the following properties:
   a. **Condition Name** - enter a short name for the condition.
   b. **Status** - select the **Enabled** option from the drop-down list.
   c. **Show Content as** - select the **Text** or **HTML** option as desired.
   d. **Store View** - select the store view in which you want to use the condition.
   e. **Checkbox Text** - enter the text for the check box that customers select to accept the condition.
   f. **Content** - enter the text of the condition.

g. **Content Height (CSS)** - specify the height of the content area.

3. Click **Save Condition**.
4. To activate Terms and Conditions, navigate to **System > Configuration**.
5. In the **Configuration** pane, select **Sales > Checkout**.
6. From the **Enable Terms and Conditions** drop-down list, select **Yes**.
7. Click **Save Config**.

1.1.9 Customer OnStop

Use this section to define the ECC system settings for OnStop customers (B2B customers who are put on hold in your ERP system).

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, under the **Customers** title, select **Customer Configuration**.
2. Expand the **Onstop Account Restrictions** section.
3. Specify if you want to **Show onstop warning to customers**.
4. Select one of the following system actions when an OnStop customer tries to access your e-commerce site:
   - Cannot login
   - Can browse the catalog and build a cart but not checkout
   - Can browse but not build a cart
   - No restrictions
5. Click the **Save Config** button.

1.2 Customer Data Upload

Customer data is sent to ECC from the ERP in a series of messages.

- **CUS** - Customer upload. This message uploads basic information relating to the customer.
- **CAD** - Customer address information. This message uploads delivery and invoice addresses that are valid for a customer.
- **CUCO** - Upload a list of ECC customer contacts from ERP. These messages are automatically created with appropriate logins on ECC and login details sent to the contact. The CUCO message is only valid if Customer Connect is installed.

  Note The xVP ERP system does not use the CUCO message.

In order to upload customer data, some mapping information needs to be configured within ECC in **Admin Panel > Epicor > Quick Start > Customer Settings** screen:

- **Customer Tax Classes** - ECC requires the tax class for each customer as it uses this information to calculate taxes. Customer data cannot be imported into ECC without having the mapping data defined even if ECC does not calculate taxes.
- **Country Mapping** - ECC requires that all addresses have a valid country defined; additional validation may be applied for addresses from specific geographic areas. You can control address verification in Admin Panel > System > Configuration > General > General, State Options section.

  For example within your ERP you may use US, USA and U.S.A as the country designator. In ECC all of these variants need to be mapped. When ECC sends addresses to the ERP system, it always uses the first mapping (USA).

ERP Code	Magento Country	
USA	United States	Remove
U.S.A	United States	Remove
US	United States	Remove
UK	United Kingdom	Remove
Mexico	Mexico	Remove
		Add

- **Currency Mapping** - When customers are uploaded, currency information is also uploaded. The ERP system uploads information for all valid currencies, not just those currencies that are used by your websites. Map all the currencies being uploaded.

ERP Code	Country	
USD	US Dollar	Remove
EUR	Euro	Remove
GBP	British Pound Sterling	Remove
PESO	Mexican Peso	Remove
		Add

  When uploading data, ECC checks the currencies that are currently configured within ECC (via sites) and uses the currencies that are part of the customer upload message (CUS) to determine which sites the customer account is valid for.

Note Use the Epicor Commerce Connect Installation Guide for information on how to configure the Quick Start screen.

1.2.1 Customer Upload

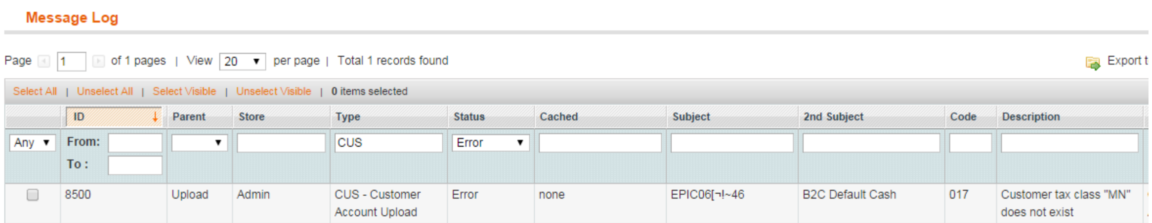
The customer upload message (CUS) uploads the information relating the customer from the ERP. You can view the status of upload messages in ECC message log.

Use these steps to review the uploaded messages and reprocess single or multiple messages.

Menu Path: Admin Panel > Epicor > Messaging > Log

1. To filter out the Customer messages, in the field under the **Type** title, enter **CUS** and press **Enter**. Review the list that displays.

2. Review the **Description** column. The **Success** entries do not require any actions. If a message was uploaded with an error, this column contains its description. In this example, a part of customer data is not mapped to ECC.



3. Update ECC data to conform to your ERP data according to the error descriptions. In this example, you need to navigate to Epicor > Quick Start screen or to Sales > Tax > Customer Tax Classes, and add the MN tax class to the Customer Tax Classes list.

4. Reprocess the messages that contain errors. To reprocess single entries, in the **Log** screen, select the check boxes for the messages that contain errors and from the **Action** drop-down list in the upper right corner of the table, select **Reprocess**.

   You can also reprocess all messages at once using the synchronization utility. To run it, navigate to Admin Panel > Epicor > Messaging > Send SYN Request. For more information on how to use this utility, review the Initiate Upload of Data section in this guide.

   Note The xVP ERP does not support the SYN message. You can reprocess the xVP messages from the ERP system. For more information on how to send the messages from xVP, review the Epicor Commerce Connect Installation Guide.

1.2.2 Customer Address Upload

The Customer Address Details (CAD) message uploads invoice and delivery addresses from the ERP system to ECC. These addresses are visible within ECC during the checkout process.

Addresses can fail to import into ECC. The most common failure is the format of the address information, especially if state (region) information is required. Use these steps to fix an address upload error:

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, under the **General** title, click **General**.

2. Verify the Countries, States and Locale options. For more information on how to set up these properties, refer to the Configure General Properties section in this guide.

3. If an address fails to import the mapping data for country (and the default country), update ECC data to conform to your ERP data in Epicor > Quick Start screen.

If the address still fails to import, you need to modify address details in your ERP system to conform to ECC standards.

1.2.3 Customer Contact Upload

The Customer Contact (CUCO) message uploads ERP named contacts into ECC. The message uploads the ERP contact details for named individuals and create logins for the users within ECC. A contact is always associated with an ERP account. This message is only valid when Customer Connect is used. Without Customer Connect, if an ERP sends a message, ECC rejects it with a license error in which you can see on the Admin Panel > Epicor > Messaging > Log screen.

Note The xVP ERP does not support the CUCO message.

Use these steps to define additional contact information:

Menu Path: Admin Panel > System > Configuration

1. Navigate to the **Customer Connect > CUCO Upload Customer Connect Users** section.
2. Use the **Send Emails to new contacts** field to define whether ECC can send email messages to new contacts informing the user that of the website URL and their password when the CUCO message is received
3. Navigate to **Customers > Customer Configuration > Create New Account Options**.
4. In the **Create New Account Options** section, select a template to use as the **Default Welcome email**. You can use a standard email or create your own template. For more information on how to create an email template, use the Transactional Emails section in this guide.

When a user logs in to ECC, the ERP account details define customer specific prices and quantity breaks from the ERP

1.3 Product Data Upload

Product data is sent to ECC from the ERP in a series of messages.

- **STK** - Product upload. This message uploads information about a product into ECC.
- **STT** - Send up extra textual information about a previously uploaded product. The STT message uploads language specific information for a product.
- **ALT** - Upload alternative information. This message uploads upsell, cross-sell and related product information for a specific product.

  Note Before an ALT message can be processed, all products must exist in ECC. For more information on how to synchronize products, review the Product Upload section below.

You need to configure additional mapping information in the **Epicor > Quick Start** screen to upload product data.

- **Product Tax Classes** - ECC requires a tax class for each product to calculate taxes. Product data cannot be imported into ECC if it does not have mapping data defined, even if ECC does not calculate taxes.

Note Use the Epicor Commerce Connect Installation Guide for information on how to configure the Quick Start screen.

1.3.1 Product Upload

The product upload message (STK) uploads the information relating the product from the ERP.

Use these steps to review the uploaded messages and reprocess single or multiple messages.

Menu Path: Admin Panel > Epicor > Messaging > Log

1. To filter out the Product messages, in the field under the **Type** title, enter **STK** and press **Enter**. Review the list that displays.

2. Review the **Description** column. The **Success** entries do not require any actions. If a message was uploaded with an error, this column contains its description. If some Product Tax class is not defined, the import can fail.

3. Update Tax Class ECC data to conform to your ERP data according to the error descriptions. To do this, you need to navigate to **Epicor > Quick Start** screen or to **Sales > Tax > Product Tax Classes**.

4. Reprocess the messages that contain errors. To reprocess single entries, in the **Log** screen, select the check boxes for the messages that contain errors and from the **Action** drop-down list in the upper right corner of the table, select **Reprocess**.

   You can also reprocess all messages at once using the synchronization utility. To run it, navigate to Admin Panel > Epicor > Messaging > Send SYN Request. For more information on how to use this utility, review the Initiate Upload of Data section in this guide.

Chapter 2: Data Upload

ERP data is scheduled for upload from the ERP system to ECC. This data upload happens in one of two ways depending on the ERP: the ERP either uploads the data in pseudo real time triggered by changes to the data in the ERP, or ECC is configured to run scheduled synchronization requests to upload the data from the ERP. Use the Appendices in the Epicor Commerce Connect Installation Guide to review the information on how to configure the ECC data synchronization in your ERP system.

2.1 Initiate Data Upload

In certain instances it is necessary to force a data upload from your ERP to ECC. One such instance is when creating initial static data in ECC.

Important Th xVP ERP system does not support the SYN message.

Use these steps to trigger an upload from ECC:

Menu Path: Admin Panel > Epicor > Messaging > Send SYN Request

1. In the **Store** list, select the stores for which you want to upload or reprocess the messages. You can use **Ctrl+Click** and **Shift+Click** to select multiple options.

2. Use the **Upload Messages** field to select the items for which you want to upload or reprocess messages. You can click the **Advanced** button at the bottom of the page to select the messages to upload.

3. Select the **Languages** you want to upload or reprocess.

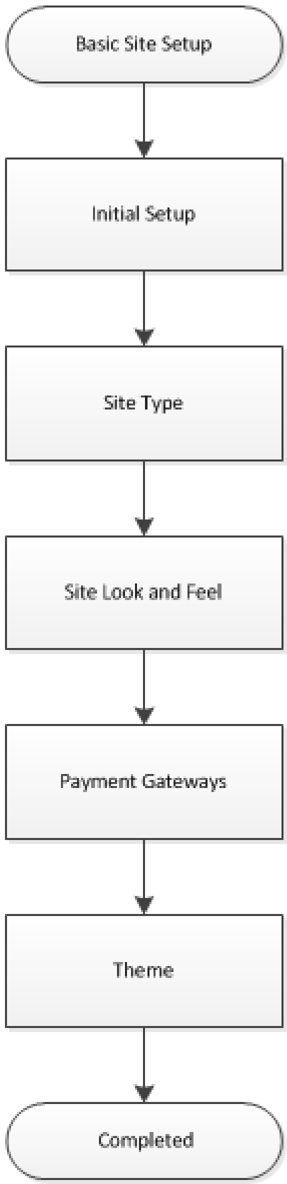
4. In the **Date From** field, select the date range for which you want to upload or reprocess the messages. For an initial upload, all data should be sent, and the Date From field can be left blank.

5. Click the **Send SYN** button.

Part III: Site Configuration

Use this section to perform minimal configurations for the website before you can use it for e-commerce.

Review this configuration flow:

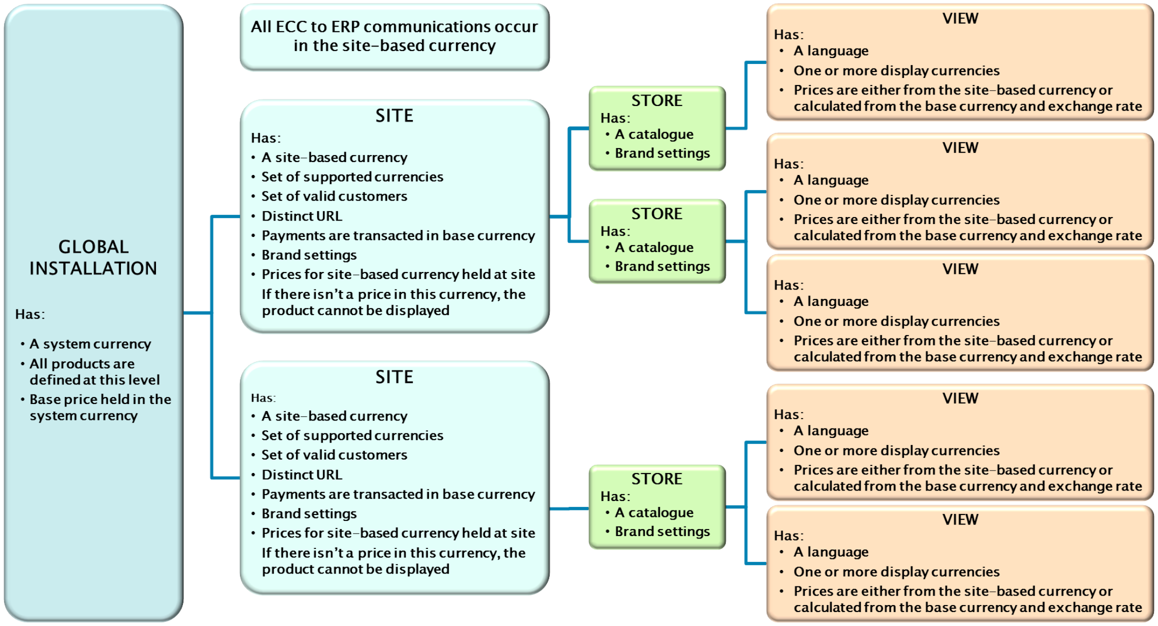


Chapter 3: Site Specific Settings

The settings in ECC can be changed on a global basis as well as on specific levels.

The Current Configuration Scope list at the top of the left Configuration panel defines the range over which the configuration settings apply. Some configuration settings apply globally to everything in the website, while others are more limited in scope. If you have multiple stores on your website, you can change the scope and make different configurations settings for each store view.

In this graphic you can view the configuration scopes:



The possible scope settings are: [GLOBAL], [WEBSITE], [STORE VIEW].

3.1 Configuration Scopes Management

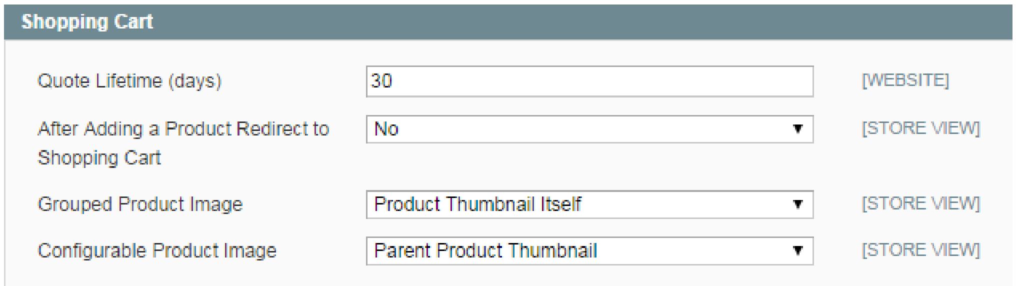
Use these steps to manage configuration scopes when you need to define settings for specific website, store or store view.

Menu Path: Admin Panel > System > Configuration

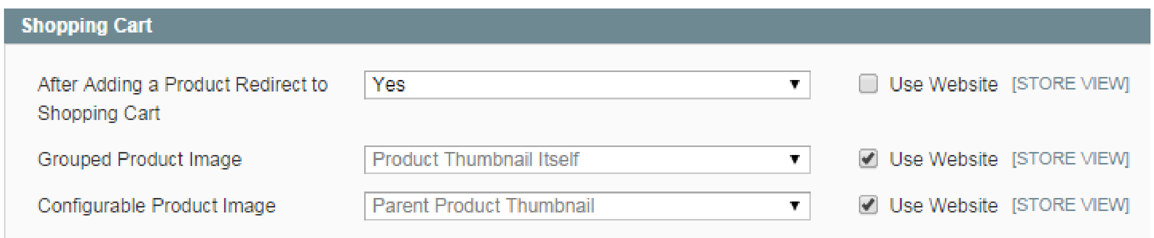
1. In the upper-left **Current Configuration Scope** list, choose the scope of the settings you want to make. Consider the following scope settings:
   - **Default Configuration** - configuration at the Default level applies to all websites if a website or store(site) specific value is not set
   - **Main Website** - configuration at Main Website scope, like Default, applies across all stores and store views; certain settings, like Table Rates, can be made only with a Main Website scope
   - **Main Store** - configuration at Store scope applies only to the specific store
   - **Storeview** (English, Spanish, etc) - store views are used to configure language or country specific settings.

2. When you select one of the levels to apply the settings to, the appearance of the configuration screens may differ.

- Some settings only apply at global level and are not visible for individual stores. For example, the quote lifetime option is only visible if the Default Config option is selected:



- If a specific store view is selected, the option is not available. In this example, you can see that the cart redirect option has been overridden for this site and is using the store view. You cannot change the field value if the **Use Website** check box is enabled:



Important When changing the settings in the configuration screens, make sure that you are changing the settings for the correct site.

Chapter 4: Initial Setup

Initial setup includes setting up of site wide data, such as contact store information, store emails and site design.

For information on how to set up store emails, refer to the Define Email and Contact Us Information section in this guide.

4.1 Store Information

The basic information for your store includes the store name and address, telephone number and email address, and appears on email messages, invoices, and other communications sent to your customers. Use these steps to define store information:

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, under the **General** title, click **General**. Expand the **Store Information** section.
2. Enter your **Store Name** as you want it to appear on customer communications.
3. Define your **Store Contact Telephone** number, formatted as you want it to appear on customer communications.
4. In the **Store Contact Address** box, specify the mailing address of your store.
5. Click the **Save Config** button.

4.2 Site Design

Site design includes such aspects as your store's pages like headers and footers, pagination, image watermarks, and so on. Use these steps define site design.

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, under the **General** title, click **Design**.
2. Use the HTML Head section to define the page title, favicon icon, meta information, title, and scripts in the HTML head tag. These elements are not all directly visible in your store. You also use this section to control the display of the Demo Store notice that appears at the top of your store prior to launch.
   a. In the **Favicon Icon** field, click the **Browse** button and select an image you want to use as a favicon for your site.
   b. Enter a **Default Title** for your storefront. This title displays on any page that does not have its own title defined.
   c. In the **Title Prefix** field, enter a prefix that will precede page titles in your storefront.
   d. In the Title Suffix field, specify a suffix that will follow page titles in your storefront.
   e. Use the **Default Description** field to define a description for your store. This meta description is used when a page does not have its own custom meta information.
   f. Enter **Default Keywords** for your store. This meta keyword set is used when a page does not have its own custom meta information.

g. Use the **Display Demo Store Notice** field to specify whether to display the Demo Store notice on your storefront.

3. Use the Header section to set the alternative text for the logo image as well as the welcome text:

a. In the **Logo Image Alt** field, enter alternative text that is displayed if the store logo does not load.

b. Enter **Welcome Text** that displays above the logo just before the Log In and Register links.

4. Use the Footer section to set copyright information and insert miscellaneous HTML, JavaScript, or CSS code for you site:

a. In the **Copyright** field, enter your store's copyright information.

Note To display the copyright symbol, type the following HTML code:

```
&copy;
```

b. In the **Miscellaneous HTML Type** field, enter or paste HTML, JavaScript, or CSS code that you want to be displayed at the bottom of all your storefront pages, regardless of theme. Code entered into this field is displayed just before the body closing tag in the page HTML.

5. Use the Product Image Watermarks section to select the image files that are used to identify your product images as your property. Complete the following steps for each image type (Base Image, Small Image, and Thumbnail):

a. Enter the **Watermark Default Size**, in pixels. For example, 200 x 300.

b. Enter the **Watermark Opacity**, as a percentage. For example, .40.

c. Click the **Browse** button and select the watermark image file to upload.

d. Set the **Watermark Position** value to one of the following:

- Stretch
- Tile
- Top Left or Right
- Bottom Left or Right
- Center

6. Define your site Pagination:

a. In the **Pagination Frame** field, enter the number of links to display at one time.

b. Enter a **Pagination Frame Skip** value. If the current frame position does not cover utmost pages, it will render link to current position plus/minus the value.

c. In the **Anchor Text for Previous** field, enter alternative text for the previous link in the pagination menu. If this field is left blank, a default arrow image is used.

d. In the **Anchor Text for Next** firld, enter alternative text for the next link in the pagination menu. If this field is left blank, a default arrow image is used.

7. Use the Transactional Emails section to upload your store logo to be used for all transactional emails.

a. In the **Logo Image** field, click the Browse button and select a file to use as the logo.

b. Use the **Logo Image Alt** field to enter alternative text to be displayed if the logo image does not load.

Note For more information on how to create and use transactional email templates, review the Transactional Emails section in this guide.

8. Click the **Save Config** button at the top of the page.

4.3 Email and Contact Us Information

Use these steps to define the Store Email Addresses information and set up the Contact Us page.

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, under the **General** title, click **Store Email Addresses**.
2. Enter **Sender Name** an **Sender Email** for the following site users:
   - General Contact
   - Sales Representative
   - Customer Support
   - Custom Email 1 and 2 (if needed)
3. In the **Configuration** pane, under the **General** title, click **Contacts**.
4. If you want the **Contact Us** link to display in the footer of your website and the Contact form to be activated, select **Yes** from the **Enable Contact Us** drop-down.
5. Define the contact properties in the **Email Options** section.

   a. In the **Send Emails To** field, define the email address that the messages will be sent to when customers use the Contact Us form.

   b. In the **Email Sender** list, select the name to appear in the From line of messages that are sent in reply to inquiries received through the Contact Us form.

   c. In the **Email Template** list, select the template to be used for customer messages sent from the Contact Us form.

   Note To create, modify or use your own template instead of the default template, see System > Transactional Emails.

6. Click the **Save Config** button.

Chapter 5: Site Look and Feel

Use this section to set up your ECC site specific functions.

Review this table for information on how the your ECC site functionality depends on the type of licensing you select.

Consumer Connect	Customer Connect	Consumer and Customer Connect
If the ECC installation is only licensed for Consumer Connect: • All your sites can only be open sites • You cannot have a portal page • ECC only allows you to upload Default ERP Account to post transactions to for each site • All other ERP customer accounts are not uploaded.	If the ECC installation is only licensed for Customer Connect: • All your sites must be portal sites • All the customers are uploaded from your ERP • You cannot have an open site.	If your ECC installation is licensed for both Customer and Consumer Connect: • You can support any site type within your installation • You are able to mix sites, having B2C sites, B2B sites and hybrid B2B2C sites.

5.1 Site Types

This section gives an overview of such ECC site types as B2C, B2B, and B2B2C. Use it to review the options of how to configure your e-commerce solution and decide which modules you need.

You can create as many sites within ECC as you want. The licensing controls what type of site you can create. To support a B2C site, you must have a Commerce Connect license. For a B2B site, you must have a Customer Connect license. You need to have both licenses installed to have a B2B2C site.

- **B2C** site is an open site that does not require user to login before being able to browse the site. A B2C site supports two types of shoppers:
  - **Guest** (or anonymous) shoppers can browse, create carts, and check out goods without having to register on the site.
  - **Registered** shoppers are users whose details the site stores.
- **B2B** site is protected by a portal page. Users cannot access the site until they are logged into the site.
- **B2B2C** is a hybrid site that allows guest and registered shoppers, but also allows B2B customers to login to the site and see their own specific pricing. B2B2C sites may be configured not to show pricing unless you are logged in.

You can create separate sites for Consumer, Customer and Supplier. Each site would have:

- Separate URL
- Separate theme
- Separate products, customers etc.

Supplier site is logically separate from a consumer and/or customer site. Suppliers do not have access to the trading section and cannot move outside of the Supplier Connect menu. Supplier home page is the supplier dashboard.

Consider the following features before you decide which type of installation you need.

Customer	Consumer	Combined
• Portal login only • All logins linked to an ERP account • Search bots cannot browse the site	• Open site • All prices are visible to everybody • Portal login not available • All transactions are linked to the default account • Search bots can index the site • No customer specific pricing	• Open site, with login for B2B and registered customers • B2B logins linked to ERP account (as Customer) • B2C logins linked to default (as Consumer) • Search bots can index the site • Default prices used

Review the following properties before you decide how to organize your sites:

Separate B2C & B2B	Combined B2B & B2C	B2B No Price Displayed
• B2C site is often a shadow site; B2B customers are not aware of the site • B2C performance can be optimised • B2B functionality is not compromised • Individual site design for each site	• B2B customers know all the public prices • Search engines publish default prices • More difficult to optimize site performance • No distinct marketing split between B2B and B2C	• Public can browse the catalogue - but no access to prices • Is really a B2B site • Site performance less of an issue • Sales to public are not supported

5.2 Contact Types

ECC has two basic types of contacts:

- **B2B contacts** are registered customers uploaded to the ECC site from the ERP system, or created via ECC. They use their business email and password to access the site.
- **B2C contacts** are not directly associated with an ERP account. Instead they are associated with the Default ERP account for the web site. A registered shopper or a guest shopper will transact with the web site. All prices, quantity breaks and other customer attributes are controlled by the Default ERP account settings. All transactions are posted to the ERP against the default account.

Use these steps if you need to change or add an ERP account for a registered shopper:

Note Changing Customer settings does not affect the contacts held in the ERP system, and ECC does not synchronize these contacts with the ERP.

Menu Path: Admin Panel > Customers > Manage Customers

1. Locate the customer you want to update and click **Edit** in the **Actions** column.
2. In the **Customer Information** pane, click **Account Information**.
3. Click the **Select** button next to the **ERP Account** field and select an ERP account you want to assign to this customer.

4. If you need to remove an assigned ERP account, click the **Remove** button. When a customer does not have an ERP account assigned, all transactions for this customer are posted against a Default ERP account which is defined on the Quick Start page.

5. When complete, click the **Save Customer** button at the top.

5.3 Portal Page

Use this section to enable the Portal Page for your B2B site.

Note You can only use the Portal Page feature if your ECC license supports this. For more information on license types, review the Site Look and Feel section.

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** panel, under the **Epicor Configuration** title, click **B2B Configuration**.

2. In the **Home Customer Registration** field, define if you want to allow users to register against the Default ERP Account.

3. Use the **Use Portal Page** field to define if your site can be accessed by registered users uploaded from your ERP system.

4. Click the **Save Config** button.

5.4 Checkout Settings

Use this section to define checkout settings.

Note Before you continue, make sure to set the correct configuration scope, if necessary. The field descriptions in the tables below identify the scope level for each setting.

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, under the **Sales** pane, select **Checkout**.

2. Define Checkout Options:

   a. To create a single-page checkout process, set **Enable Onepage Checkout** to **Yes**.

   b. Set **Allow Guest Checkout** to one of the following:

   - **Yes**: Allows guests to complete the checkout process without creating an account.
   - **No**: Requires guests to create an account with your store before completing the checkout process.

   Note This setting can only be applied a B2C or B2B2C site.

   c. To display the Terms and Conditions during checkout, set **Enable Terms and Conditions** to **Yes**.

   Note To enable Terms and Conditions, one page checkout must be enabled. Refer to the Terms and Conditions section in this guide for more information.

3. Use the Shopping Cart section to configure what happens after an item is placed in the cart, and the selection of thumbnail images for Configurable and Grouped products:

   a. To redirect the customer to the shopping cart page after adding a product, set **After Adding a Product Redirect to Shopping Cart** to **Yes**.

   b. In the **Grouped Product Image** list, select one of the following options to determine which thumbnail appears in the shopping cart:

      - Product Thumbnail Itself
      - Parent Product Thumbnail

   c. In the **Configurable Product Image** list, select one of the following options to determine which thumbnail appears in the shopping cart:

      - Product Thumbnail Itself
      - Parent Product Thumbnail

4. The My Cart link is located in the upper-right header of your store, and displays a summary of the current contents of shopping cart. Use the My Cart Link section to configure the type information that is displayed in the Cart Summary. From the **Display Cart Summary** list, select one of the following as the type of summary information you want to appear:

   - Display number of items in cart
   - Display item quantities

5. The Shopping Cart Sidebar section lets you enable and configure the shopping cart sidebar that appears when the My Cart link is clicked. To configure the Shopping Cart Sidebar:

   a. Set **Display Shopping Cart Sidebar** to **Yes** to enable this feature.

   b. In the **Maximum Display Recently Added** Item(s) field, enter the number of shopping cart items to display in the shopping cart sidebar.

6. The Payment Failed Emails section allows you to configure the email template to be used, the recipient, as well as the sender of the email notification messages that are sent whenever a customer transactions fail.

   a. In the **Payment Failed Email Receiver** list, select the email address that notifications will be sent to when a payment fails.

   b. In the **Payment Failed Email Sender** list, select the email address that notifications will be sent from when a payment fails.

   c. In the **Payment Failed Templates** list, select the email template to be used for email notification of failed transactions.

   d. In the **Send Payment Failed Email Copy To** field, type any other email addresses that you want to receive a copy of the notification. To include multiple addresses, separate each by a comma.

   e. In the **Send Payment Failed Copy Method** field, select one of the following:

      - **Bcc**: (Blind Carbon Copy) Sends a copy of the email message, but does not include the email address of the recipient in the email header.
      - **Separate Email**: Sends a separate copy of the email notification to the recipient, and includes the email address of the recipient in the message header.

7. Use the Add to Basket via CSV section to define the CSV upload settings.
   a. Set **Allow from My Account** to **Yes** to enable this feature.
   b. In the **All From Quick Order Pad** field, define whether the CSV upload is available from the Quick Order Pad screen.
   c. Set **Allow Block Display** to **Yes** to enable the display block. The actual position and visibility of the block is controlled by the theme.

8. Click **Save Config**.

5.5 Stock Settings

Use these steps to define live stock settings.

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, under the **Epicor Configuration** title, click **Networking and General**.
2. Expand the **Live Stock Level Options** section.
3. Use the **Display Type** field to select stock level appearance. The following options are available:
   - **In/Out** - indicates if the item is in stock.
   - **Actual Level** - the Stock Level property indicates how many items are available.
   - **Traffic Lights** - indicates if the item is in stock by the color. If you use this option, you also need to define additional properties for the traffic lights icon.
4. When complete, click the **Save Config** button.

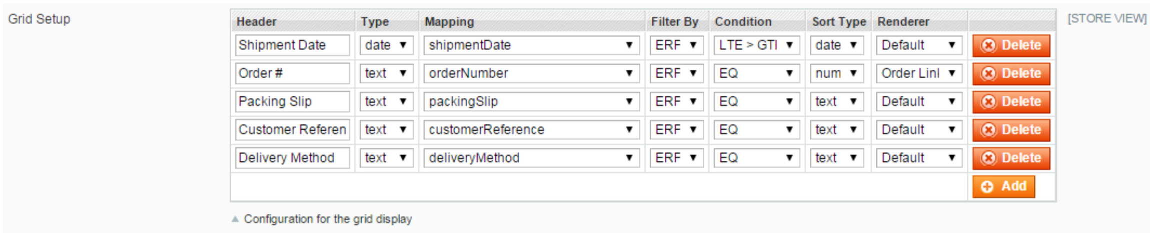
5.6 Customer Shipment Search

The ECC system uses the CUOS message to get information from your ERP system when you search for a customer shipment on ECC site. Use these steps to set up the Customer Shipment Search parameters.

Menu Path: Admin Panel > System > Configuration

1. Under the Epicor Configuration title, click **Customer Connect**.
2. Expand the **CUOS Customer Order Search** section.
3. Make sure the **Enabled** field is set to **Yes**. This means the search is enabled.
4. Optionally, define the following settings:
   - Timeout
   - Max Results
   - Range Minimum

5. Use the **Grid Setup** table to define search filters and parameters to use. Your table may look similar to the following:



a. In the **Header** field enter the text to display on the column header.

b. The **Type** field defines the data type of the field as held in ECC. Do not change this value for already existing entries.

c. In the **Mapping** field, select the field name that the column is mapped to in the XML upload.

d. Use the **Filter By** field to select whether ECC or ERP must filter data with the search condition applied. Some ERP systems are not able to filter on all of the column values, nor are all ERPs able to sort with all condition types. If your ERP is unable to sort as required change the value to ECC.

e. Select a search **Condition**:

- **EQ** - an exact match; works with any data type
- **NEQ** - anything that do not match the value given; works with any data type
- **LIKE** - allows partial matches with string or text data types only
- **LT** - search values must be less than the value specified; works with any data type
- **GT** - search values must be greater than the value specified; works with any data type
- **LTE** - search values must be less than or equal the value specified; works with any data type
- **GTE** - search values must be greater than or equal the value specified; works with any data type
- **LT>GT** - a range entry option when values greater than the lower bound and less than the upper bound; works with any data type
- **LTE>GTE** - a range entry option when values greater than or equal to the lower bound and less than or equal to the upper bound; works with any data type.

f. In the **Sort Type** field, select a collation sequence for the result data.

g. Select a **Renderer** which defines where user is redirected to.

6. Change the Error Handling and Warning Actions settings if needed.

7. When complete, click **Save Config**.

5.7 Supplier Purchase Order Search

The ECC system uses the SPOS message to get information from your ERP system when you search for a supplier purchase order on ECC site. Use these steps to set up Supplier Purchase Order Search parameters.

Menu Path: Admin Panel > System > Configuration

1. Under the Epicor Configuration title, click **Supplier Connect**.

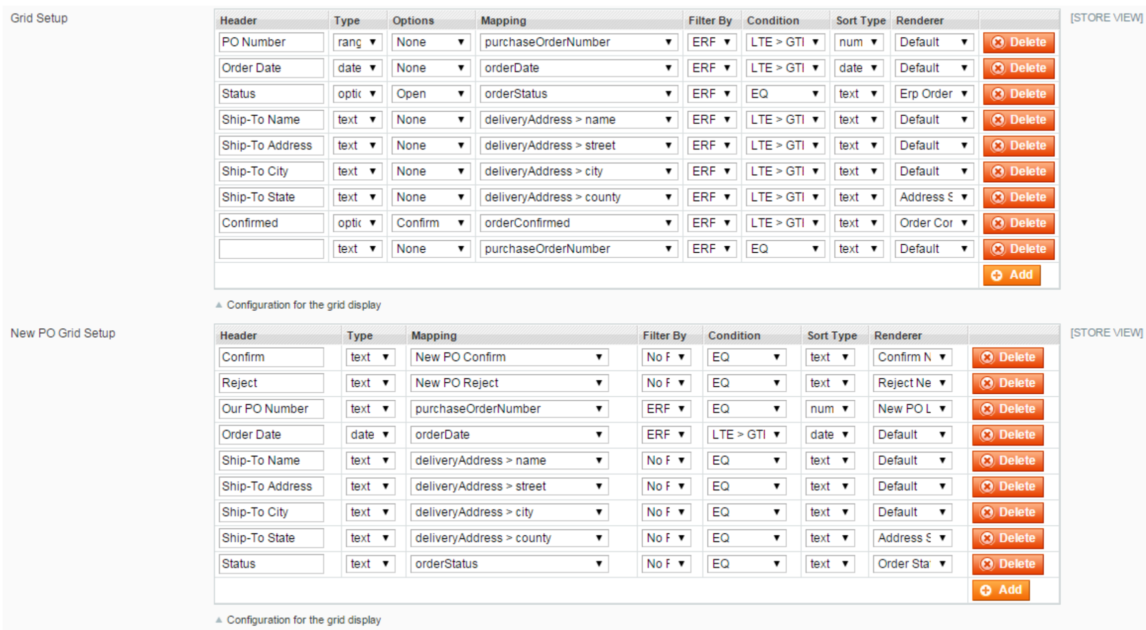
2. Expand the **SPOS Supplier Purchase Order Search** section.

3. Make sure the **Enabled** field is set to **Yes**. This means the search is enabled.

4. Optionally, define the following settings:

   - Timeout
   - Max Results
   - Range Minimum

5. Use the **Grid Setup** table to define search filters and parameters to use. Your table may look similar to the following:



   a. In the **Header** field enter the text to display on the column header.

   b. The **Type** field defines the data type of the field as held in ECC. Do not change this value for already existing entries.

   c. In the **Mapping** field, select the field name that the column is mapped to in the XML upload.

   d. Use the **Filter By** field to select whether ECC or ERP must filter data with the search condition applied. Some ERP systems are not able to filter on all of the column values, nor are all ERPs able to sort with all condition types. If your ERP is unable to sort as required change the value to ECC.

   e. Select a search **Condition**:

      - **EQ** - an exact match; works with any data type
      - **NEQ** - anything that do not match the value given; works with any data type
      - **LIKE** - allows partial matches with string or text data types only
      - **LT** - search values must be less than the value specified; works with any data type
      - **GT** - search values must be greater than the value specified; works with any data type
      - **LTE** - search values must be less than or equal the value specified; works with any data type
      - **GTE** - search values must be greater than or equal the value specified; works with any data type

- **LT>GT** - a range entry option when values greater than the lower bound and less than the upper bound; works with any data type
- **LTE>GTE** - a range entry option when values greater than or equal to the lower bound and less than or equal to the upper bound; works with any data type.

f. In the **Sort Type** field, select a collation sequence for the result data.

g. Select a **Renderer** which defines where user is redirected to.

6. Change the **Error Handling** and **Warning Actions** settings if needed.

7. When complete, click **Save Config**.

5.8 Quotes

Use these steps to define quotes settings.

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, under the **Epicor Configuration** title, click **Quotes**.

2. Expand the **General** section.

3. Define the number of days in which the quote is valid in the **Quotes Expire in x Days** field.

4. Use the **Email Alerts** section to define details for Admin and Customer emails as well as for the Notes templates.

5. When complete, click **Save Config**.

5.9 Returns

Use this section to set up returns management.

Menu Path: Admin Panel > System > Configuration

1. Under the Epicor Configuration title, click **Returns**.

2. Define General properties:

   a. Expand the **General** section.

   b. Set the **Enable Actions Support** field to **Yes** to enable the returns functionality.

   c. Define whether to **Cleanup Unsubmitted Returns** in your database.

3. Configure returns management for different customer types. To do this, expand the sections for the following types:

   - **Guest Customers (Non Logged In)**
   - **Guest Customers (Logged In)**
   - **B2B Customers**.

a. Set the **Enabled** field to **Yes** to make returns management available for the customers.

b. Set the **Allowed to Create Returns** field to **Yes** to enable the customers to submit their returns on your ECC site.

c. In the **Find Return By** box, select the filters customers can use to find the product they want to return. To select multiple filters, use Ctrl+Click.

d. Use the **Enable "Add Products by SKU"** drop-down to define whether the customers can use the Add Product by SKU filters when selecting a product to return.

e. Set the **Non Web Enabled SKU Types supported** field to **Yes** if you want your customers to be able to use non web enabled SKUs for input in the Add Products by SKU field.

f. Use the **Enable "Find Products"** drop-down to define whether the customers can use the Find Products filters when selecting a product to return.

g. In the **"Find Products" Allowed Search Types** box, select the search filters you want to be available in the Find Products field.

h. Define whether you want to **Allow Mixed Return**. If you set this field to **Yes**, the system allows customers to submit returns from different orders together.

i. Select whether you want the customers to use attachments **At Return Level** and **At Line Level**.

j. Define the following settings for **Status Update Email Alerts** and **Error Email Alerts**:

- **Send to Customer** - Specify whether customers should receive email alerts.
- **Customer Email Template** e - Select an email template to use for customer alert.
- **Customer Email Template** - Select a contact that sends the customer email alert.
- **Send to Admin** - Specify whether admin should receive email alerts.
- **Admin Email Template** e - Select an email template to use for admin alert.
- **Admin Email Template** - Select a contact that sends the admin email alert.

4. After you define the returns settings for all types customers, click **Save Config**.

5.10 Default Landing Page for B2B Customers

When a B2B customer logs into the system, you can control which page they land on first.

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, under the **Customer** title, click **Customer Configuration**.

2. Expand the **Login Options** section.

3. To display customers' Account Dashboard immediately after they log in, set **Redirect Customer to Account Dashboard after Logging** in, to **Yes**. You can select either the Customer Connect or My Account dashboard pages in the **Dashboard Priority** field in the section below Login Options.

4. If you choose not to redirect customers to account dashboard, you can select a default **Landing Page**. The options are:

- Last page before login
- Selected CMS page

5. If you want a specific CMS page display as a landing page, you need to select it from the **CMS Page** drop-down which displays.

6. Optionally, change **Login Restrictions**.

7. Click the **Save Config** button.

5.11 Specific B2C Site Setup

Consider the following areas while setting up your B2C site:

- **SEO Ranking**

  Site performance is much more critical for a B2C site. Google rankings consider site performance as part of the ranking.

- **Performance**

  B2C site should be configured to use as few messages as possible with the ERP system. As the site is B2C, there are no customer specific prices (there may be customer specific promotions which are managed in ECC). Stock Enquiry messages (MSQ) are not required for a B2C site, unless you need accurate stock status on the site. Typically, a B2C site does not need to send Basket Valuation messages (BSV) to the ERP system.

- **Payment gateways**
  - Will the site take payment at time of order?
  - Payment at time of dispatch with pre-authorization.
  - Credit card, debit card, PayPal 3rd party information, such as a merchant ID for credit cards, or PayPal account details needed for these sections.

- **Online - offline processing**

  BSV and GOR need to be configured not to use re-pricing when payment at time of order is active.

- **Tax calculations**
  - Will this be setup in ECC so that the tax calculates correctly when offline?
  - Will a 3rd party plug in like Avalara be used?
  - Will the ERP calculate the tax? If Yes, you cannot take orders in offline mode.

5.12 Specific B2C Site Setup

Consider the following areas while setting up your B2C site:

- **SEO Ranking**

  Site performance is much more critical for a B2C site. Google rankings consider site performance as part of the ranking.

- **Performance**

  B2C site should be configured to use as few messages as possible with the ERP system. As the site is B2C, there are no customer specific prices (there may be customer specific promotions which are managed in ECC). Stock Enquiry messages (MSQ) are not required for a B2C site, unless you need accurate stock status on the site. Typically, a B2C site does not need to send Basket Valuation messages (BSV) to the ERP system.

- **Payment gateways**
  - Will the site take payment at time of order?

- Payment at time of dispatch with pre-authorization.
- Credit card, debit card, PayPal 3rd party information, such as a merchant ID for credit cards, or PayPal account details needed for these sections.

- **Online - offline processing**

  BSV and GOR need to be configured not to use re-pricing when payment at time of order is active.

- **Tax calculations**
  - Will this be setup in ECC so that the tax calculates correctly when offline?
  - Will a 3rd party plug in like Avalara be used?
  - Will the ERP calculate the tax? If Yes, you cannot take orders in offline mode.

5.13 Specific B2B2C Site Setup

While setting up your B2B2C site you need to consider all B2C and B2B areas.

You may also need to define whether the shoppers can see the pricing. You can manage this from Admin Panel > System > Configuration > Customer Configuration > Disable functionality.

Chapter 6: Access Rights

ECC has a set of default access controls you can use for your site, but if you need a more adjustable access control system, you can enable Access Rights to create custom rules for your site users.

You can define access rights for such access groups as guest shoppers, registered shoppers (B2C), customers (Customer Connect) and suppliers (Supplier Connect).

ECC offers the following pre-defined access groups:

- **Customer - full access**. This access right provides site user with full access to all eCommerce functionality and My Account features.
- **Customer Connect - full access**. This access right provides site user with full access to all Customer Connect functionalities, including the ability to alter ERP data.
- **Customer Connect - read only**. This access right provides site user with full access to all Customer Connect functionalities, with read only access to ERP data. The user cannot alter ERP data.
- **Customer Connect - manage permissions**. This access right gives user the ability to alter access rights for other contacts associated with the same customer account.
- **Supplier Connect - full access**. This access right provides site user with full access to all Supplier Connect functionalities, including the ability to alter ERP data.
- **Supplier Connect - read only**. This access right provides site user with full access to all Supplier Connect functionalities, with read only access to ERP data. The user cannot alter ERP data.
- **Supplier Connect - manage permissions**. This access right gives user the ability to alter access rights for other contacts associated with the same supplier account.

6.1 Enable Access Rights

Use these steps to enable the Access Rights functionality within your ECC system.

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, under the **Customers** title, click **Access Rights**.
2. Set the **Enabled** field to **Yes**.
3. Use the default **Cache lifetime** value or enter a value you want to use. The default value is 24 hours (86400 seconds). Typically, access rights are not altered on a regular basis. If the access rights are altered and you want to see an immediate effect, you can refresh the access rights cache in Admin Panel > System > Cache Management.
4. The system displays customer classes and pre-defined access groups that can be assigned to these classes. The following groups are selected by default:

   Note The system also uses the default settings when the Access Rights functionality is not enabled.

   - **Guest Access Group** (Guest shoppers)
     - Customer - full access
   - **B2C Access Group** (Registered shoppers)
     - Customer - full access

- **Customer ERP Account Access Group** (Customers)
  - Customer - full access
  - Customer Connect - full access
- **Supplier ERP Account Access Group** (Suppliers
  - Customer - full access
  - Supplier Connect - full access

You can select additional rights for each group, change them, or keep the default settings.

5. When complete, click the **Save Config** button at the top.

6.2 Enable Access Rights Cache

If the site is running with cache settings enabled, the system reads access rights from the ECC database when a user logs in. To improve performance, ECC has access rights cache.

To enable access rights cache:

Menu Path: Admin Panel > System > Cache Management

1. Select the check box next to the **Access Rights Cache** item in the **Cache Type** column.
2. In the **Actions** drop-down, select **Enable**.
3. Click the **Submit** button.

6.3 Create Access Groups

Access Groups are sets of access rights you can assign to your customers and suppliers. Access rights may be shared across many groups, and a group can reference more than one access right.

Use these steps to create a custom access group.

Menu Path: Admin Panel > Customers > Access Management > Access Groups

1. Click the **Add New Group** button at the top.
2. Enter a name for the new **Access Group**.
3. From the **Type** drop-down list, select whether you want to apply this right to a **Customer** or a **Supplier**.
4. Optionally, select an **ERP Account** you want to associate with this access group.

   Note If a group is associated with a specific customer or supplier, a contact associated to that ERP account using the Contacts > Manage Permissions settings can alter the group rights.

5. Select the access rights to include in the new group:

   Note You can also use the Access Rights menu to associate them with a group. Review the Create Access Rights in this guide for more information.

   a. In the Access Group pane, click **Access Rights**.

b. In the first column of the grid, select **Any** from the drop-down list and click the **Search** button.

c. In the list of available access rights, select the check boxes next to the rights you want to associate with the new customer group.

d. Click the **Save and Continue Edit** button.

6. Assign customers to the new access group:

Note You can also use Customer Management to assign customers to an access group.

a. In the Access Group pane, click **Customers**.

b. In the first column of the grid, select **Any** from the drop-down list and click the **Search** button.

c. In the list of available customers, select the check boxes next to the customers you want to assign to the new customer group.

d. Click **Save**.

6.4 Create Access Rights

Access rights allow the site administrator to define which rights are enabled and disabled, and as such which areas of a website a shopper can access.

Use these steps to create a custom access right.

Menu Path: Admin Panel > Customers > Access Management > Access Rights

1. Click the **Add New Right** button at the top.
2. Enter a name for the new **Access Right**.
3. From the **Type** drop-down list, select whether you want to apply this right to a **Customer** or a **Supplier**.
4. Select the allowed elements for the new access right:

   a. In the Access Right pane, click **Elements**.

   b. In the first column of the grid, select **Any** from the drop-down list and click the **Search** button.

   c. Select the elements of access you want to allow in this access right.

   d. When complete, click **Save and Continue Edit**.

5. Add the new access right to an access group:

   a. In the Access Right pane, click **Groups**.

   b. In the first column of the grid, select **Any** from the drop-down list and click the **Search** button.

   c. Select access groups to which you want to add the new access right.

6. Click **Save**.

6.5 Assign Customers to Access Groups

You can assign your customers to access groups in Customer Management.

Use these steps to assign a customer to an access group.

Menu Path: Admin Panel > Customers > Manage Customers

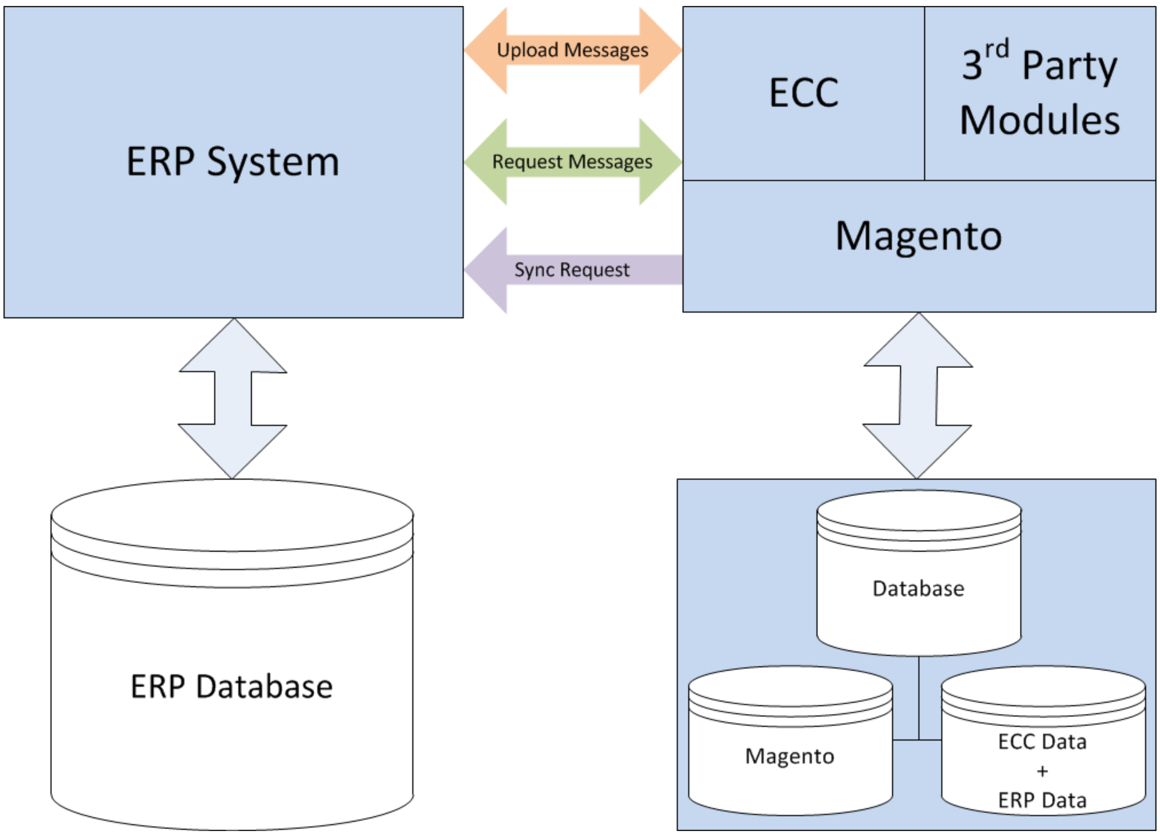
1. Click the row of the customer that you want to edit.
2. Select **Access Groups** in the **Customer Information** pane.
3. The list of **Access Groups** to which the customer belongs displays. If none are listed, the customer uses the global defaults. To change the current setting, in the first column, select **Any** from the drop-down list and click the **Search** button.
4. Select the Access Group(s) to which this customer is to belong.
5. Click the **Save Customer** button.

Part IV: Messaging

Epicor Commerce Connect uses XML messages to communicate with your ERP system. Such systems as Epicor ERP 10, Prophet 21 and xVP use HTTP/HTTPS protocol to send and receive data from ERP, and Tropos can use SOAP messaging.

The number of message listeners in the ERP system depends on the type of license you use. The busier your e-commerce site is, the more web services you need to ensure the site high performance. The messages are sent by ECC in parallel and are queued by the ERP system .

Review the ECC - ERP messaging scheme below:



ERP to ECC	ECC to ERP
When data is changed in ERP, the following messages are send to ECC to update the site: • Prices, products, customer, suppliers, addresses, contacts • Site structure and exchange rates.	ECC requests data from ERP when a site visitor browses the catalog; • Price, stock check, cart updates • ECC accepts payment and sends orders to ERP • ECC allows customers and suppliers to view account information.

All messages consist of one or several components that reflect the data from your ERP system. You can control how the messages work in ECC Admin Panel:

- **Admin Panel > Epicor > Messaging > Log** - view the message statuses and reprocess single or multiple messages.

- **Admin Panel > Epicor > Messaging > Request Messages** - configure the messages from ECC to ERP.
- **Admin Panel > Epicor > Messaging > Upload Messages** - control how ECC responds when it receives messages from ERP.

Chapter 7: Request Messages

The request messages are the messages that ECC sends to the ERP while the shopper is browsing the site or checking out. The actual messages sent depend on the site type.

To change the message settings, navigate to **Admin Panel > System > Configuration**. In the **Configuration** pane, under the **Epicor Configuration** title, select **Request Messages**.

All request messages have some general message settings. These are:

- **Enabled**

  Indicates if the message is enabled. If the message is not enabled, ECC does not send the message to ERP.

  Note The BSV message is an exception. It is always sent before a GOR regardless of the BSV message settings.

- **Timeout**

  The timeout for each message can be altered on a message by message basis. If this value is not defined, you can set it up in Admin Panel > Epicor > Messaging > Networking and General, Networking section. The typical Timeout value is 20-30 seconds. It controls the time that ECC waits for a response from the ERP before assuming that ERP is not available. In most cases the default setting does not need to be changed.

- **Logging**

  This controls if the message is logged in the ECC messaging log. All error messages are logged regardless of this setting. When a site is first configured it can be helpful to turn message logging on to improve problem diagnosis.

7.1 Request Message Types

This section describes the request messages and their settings.

AST - Account Status

This message is used on B2B sites to determine if a customer is on stop and the financial status of their account. The Customer Account ERP summary widget uses this message to return the actual ERP account information.

This message should not be disabled.

BSV - Basket valuation message

This message is used to value a basket. It is required if the ERP system amends the order adding new lines or altering the prices.

- **B2C** - Most B2C sites do not need to enable this message. All pricing and quantity breaks should be available on the ECC site as part of the STK message or via the scheduled MSQ messages.
- **B2B** - B2B sites must have this message enabled. Quantity breaks and customer specific pricing as well as ERP based promotions may alter the value of the basket.

CDM - Configurator details message

Only available with Epicor ERP.

This message is only sent when a configurator product is being used. This message should not be disabled.

CIM - Configurator initiation message

Only available with Epicor ERP.

This message is only sent when a configurator product is used. This message should not be disabled.

CNC - Create new ERP customer

Only available with Prophet 21 and Tropos.

The message is sent when a customer creates a new account in ECC. If ERP accounts are not required when ECC accounts are created, this message must be disabled. Define the following value for the message:

- **Default Template Code** - enter the ERP template account used to create new ERP accounts.

You can adjust additional properties of the CNC message in the Epicor Configuration > B2B Configuration section.

DDA - Delivery date availability

This message is used to return delivery dates/rounds to ECC. If you do not want to display delivery dates as part of the checkout process, this message should be disabled.

If this message is enabled, the ERP returns one or more dates for the user to select. The selected delivery date is communicated to the ERP in the subsequent BSV and GOR messages.

GOR - Order message

GOR is the message that actually creates an order in the ERP. The timing for the GOR message depends on the payment gateway settings.

This message cannot be disabled. For more information on the GOR message settings, view the GOR - Order Message section later in this guide.

GQR - Generate quote request

Only available for Prophet 21 and Epicor ERP 10.1 (or later).

The message synchronizes quotes generated from the ECC basket with the ERP. If the message is not supported by the ERP or is disabled, the quote can be managed and processed via the ECC in Admin Panel > Order > Quotes. If the quote is synchronized with the ERP system, you can manage it both in ECC and in ERP.

If ECC quotes are not required in the ERP, this message should be disabled. If enabled all ECC basket quotes are also sent to ERP.

HRT - Heart beat

This message is used by ECC to check the status of the ERP. This message should not be disabled.

MSQ - Stock enquire message

The MSQ message is used to get the price and quantity breaks for a specific logged in customer. The MSQ is sent whenever a product list page or a product detail page is shown. The message interacts with the ECC Caches message cache.

This message has the largest effect on the performance of a website. For more information on the MSQ message settings, view the MSQ - Stock Enquire Message section later in this guide.

SYN - Synchronization request

The SYN request is generated by a user requesting a data sync with the ERP.

ECC can be configured to generate scheduled SYN requests. This is a mandatory requirement for Prophet 21, and is unlikely to be required for other ERPs.

This message should not be disabled.

7.1.1 GOR - Order Message

Use this section to define the GOR - Order Message settings.

Use the **Trigger Conditions** section to define which payment and order status conditions can trigger the order processing.

Complete the **Message Settings** section to control how the GOR message is constructed and used within ECC. Define the following parameters:

- **Prevent Repricing** - This function stops the ERP repricing an order. The ERP system may re-price an order to calculate tax, add in ERP specific discounts, add ERP specific order lines (such as free offers). If this field is set **Yes** the ERP does not change the order. The BSV sent before the GOR should do any repricing if required.

  Prophet 21 and Epicor ERP 10 are exceptions because the tax figure is always re-calculated in these ERP systems.
- **Default days to shipping** - The number of days from order creation that the ERP required date must default to.
- **Include Tax and Delivery in Total** - Define if you want to include the tax and delivery price in the total price of the order.
- **Automatically invoice order** - In ECC, the order status is automatically set to invoiced. Customers using My Account see the order status. This field must be set to **No** for all ERPs that support the SOU message - E10, P21, xVP, Tropos.
- **Automatically ship order** - In ECC, the order status is automatically set to shipped. Customers using My Account see the order status. This field must be set to **No** for all ERPs that support the SOU message - E10, P21, xVP, Tropos.
- **ERP Order Reference Prefix** - This is the prefix for the ECC order reference. Some customers may wish to set a different order prefix for each of their websites. ECC appends an order count value to the prefix and generates a unique order number. The ERP uses this ECC order number to map between the ERP order number and the ECC order.

Use the **Error Actions** section to define how the system should handle the errors that occur during the GOR message processing. Define the following parameters:

- **Action** - the following actions are available:
  - **Continue** - The user is unaware that an error has occurred. This is the default and normal setting for the GOR message.
  - **Error Page** - The user sees an error page. In most cases the user is unable to change the behavior of the GOR message, so the error page is informative only.
  - **Offline Site** - The site is put into offline mode. All of the offline rules are applied. For more information on how to set up the offline rules, review the Define Networking Options earlier in this guide.
- **Send Magento Admin Notification** - If set to **Yes**, a notification is logged in the Magento notification system. A notification is logged for every GOR that fails. You can view the notifications in Admin Panel > System > Notification.
- **Send User Notification** - If set to **Yes**, user sees an error message on the site.

- **Send Admin Email** - If set to **Yes**, the system admin receives an email on each GOR error.

7.1.2 MSQ - Stock Enquire Message

Use this section to define the MSQ - Stock Enquire Message settings.

Note Epicor recommends to enable the message cache. For more information, refer to the ECC Caches section in this guide.

The **Send MSQ on** section controls when ECC sends an MSQ message to the ERP, if the message is enabled. If the specific sections do not display on the page or are not used in the site, no messages are sent. Without MSQ caching enabled, each of the sections below could cause an MSQ message to be sent to the ERP. If multiple widgets display on a single page, multiple MSQ messages may be triggered. Define the following parameters in the Send MSQ on section:

- **Product Details** - Page ECC sends an MSQ message every time a site user visits the product details page. The information returned is used to show the quantity breaks, prices and stock levels.
- **Grouped products** - For product sets ECC can send an MSQ for all grouped products shown on the page
- Product list pages (Category / Search results / Quick Order Pad results
- **Wishlists** - When a user visits the wishlist page, or the wishlist widget is displayed and MSQ is sent.
- **Last ordered items** - If the last ordered items widget is displayed on the current page, an MSQ message is sent.
- **Compare products** - If the compare products widget is displayed on the current page, an MSQ message is sent.
- **Featured products**- If the compare products widget is displayed on the current page, an MSQ message is sent.
- **Related products** - If the compare products widget is displayed on the current page, an MSQ message is sent.
- **Cross sell display** - If the compare products widget is displayed on the current page, an MSQ message is sent.
- **Product upsell on product detail page** - On the product list page upsell products are displayed. ECC can send an MSQ for these products.

Complete the **Message Settings** section to control how the MSQ message is constructed and used within ECC. Define the following parameters:

- **Products Always In Stock** - The product always displays as in stock regardless of the values returned in the MSQ.
- **Display customer price as base price** - If set to No you will see base price as the regular price and customer price as the special price. If set to yes then only the customer price is shown.
- **Update Prices or Stock** - This attribute controls what information that displays on the page. There are three options available to control prices and stock information appearance:
  - Both the price and stock values returned in the MSQ display.
  - Only the price from the MSQ message is used, the stock value held within ECC is used.
  - Only the stock value from the MSQ message is used, the price held within ECC is used.

The MSQ - Stock Enquire Message settings differ for the B2C and B2B site. Consider the following information to set up the MSQ message correctly:

- **B2C** - Typically, this message is not required for a B2C site, and the message triggers can be set to no to stop sending the message when the customers browse the site. For a B2C, site the MSQ should not return new data. The prices for the default customer must match the ones returned by the MSQ. If the base stock price sent via the STK message is not the correct price, the Send MSQ after STK option must be enabled to ensure that the price in ECC is correct.

The number of products scheduled in a single MSQ message depends on the ERP system performance. The more products are included in the message, the longer the message takes to process. You may need to change the Timeout settings if the message fails to process.

To ensure that actual prices are available within ECC, the Send Scheduled MSQ option must be enabled. The default ERP account should be used.

This message should be used in conjunction with the ECC Caches message cache. To define the Message Cache Lifetime, navigate to Admin Panel > Epicor > Messaging > Network and General, and expand the Cache Settings section. Epicor recommends to set this value to 24 hours or less.

- **B2B** - This message is required for a B2B site. It should be used in conjunction with the ECC Caches message cache. To define the Message Cache Lifetime, navigate to Admin Panel > Epicor > Messaging > Network and General, and expand the Cache Settings section. Epicor recommends to set this value to 24 hours or less.

Chapter 8: Upload Messages

Upload messages are sent from the ERP system to ECC as data is changed in the ERP. These messages are either pushed up from the ERP as data is changed, or the frequency of these messages depends on the ERP configuration. In some ERP systems, for example Prophet 21, the messages are pulled from ERP by ECC with a SYN message.

When ECC synchronizes data with the ERP system, ECC can keep track of all the upload messages and compare them to existing data in ECC. ECC is able to track all the data that is not uploaded from the ERP system. In this way, if there is data mismatch between ECC and ERP, data can be synchronized and invalid data can be deleted. This setting allows the user to choose which message types to preselect for data purging.

To change the message settings, navigate to **Admin Panel > System > Configuration**. In the **Configuration** pane, under the **Epicor Configuration** title, select **Upload Messages**.

Define **Address Defaults** in the General Mapping section. Addresses within ECC require a country. This setting is not mandatory for all ERPs. If you set the **Require Country** value to **No**, ECC does not require a country from ERP and allows a default country to be specified.

8.1 Upload Message Types

This section describes the upload messages and their settings.

Note Not all messages are supported by all ERPs.

You can Enable or Disable all messages. If you disable a message, ECC ignores it when your ERP system sends an upload request.

The ECC system allows you to define different message settings for the stores you have. For example, if you do not want the customers to create back orders for one specific site or store, you can change the CUS > Allow Back orders Default setting for that one site. All other sites will use the customer default defined within the ERP.

8.1.1 ALT - Update alternative product codes

Use the ALT message section to define how the ERP encodes the alternatives for related, cross and up sell items. The alternative part code needs to be sent in the STK message first. ECC reports an error if the product referenced in the ALT message has not been updated to the site.

Note Currently ECC cannot do brand based upsells.

You can change the encoding letter if you want to alter the way the product type is displayed via the ALT message. ECC supports three types of alternatives:

- **Related** products appear on the product details page. These products are supposed to be purchased in addition to the item the customer is viewing. For example, if a customer wants to purchase a printer, the related products may be paper and printer cartridges. The default encoding is **R**.
- **Cross Sell** items appear in the shopping cart or on the details page. The cross sells block displays a selection of items marked as cross sells to the items already in the cart. These items work like impulse buys such as magazines and sweets at the checkout in a supermarket. The default encoding is **X**.
- **Up Sell** items for a product are items that your customers would ideally buy instead of the product they are viewing. They might be better quality, produce a higher profit margin, or be more popular. The default encoding is **U**.

8.1.2 CAD - Upload customer address details

This message sends customer's delivery or invoice address details up to ECC.

8.1.3 CPN - Upload customer part number

The CPN message uploads alternative part numbers on a global basis and for specific customers.

Use this section to define the CPN settings:

- Define an **ERP code for global part numbers**. Normally, this field is blank which means global. You can also configure it for your ERP, for example, set it to the default ERP account.
- Set **Append SKUs** to one of the following:
  - **Yes** - The CPNs display in the frontend.
  - **No** - Only primary SKU displays (falls back to secondary then tertiary if none present)
- The **Primary SKU**, **Secondary SKU**, **Tertiary SKU** fields define the order in which the SKUs display in the frontend. The following options are available:
  - **Product SKU** - default SKU for the product
  - **Alternative SKU** - global SKU
  - **Customer SKU** - customer specific SKU

8.1.4 CUS - Upload customer record

The CUS message send customer details up to ECC.

Use the following fields to define the creation and update settings:

- **Update default addresses** - If set to **Yes**, the CUS message changes the default addresses held against the account within ECC, even if they have been edited in ECC. The ERP data remains as master data.
- **Minimum Order Options** - This option lets you choose which minimum order values to use. The following options are available:
  - **Magento** - use the values set in Magento and do not overwrite on upload.
  - **ERP** - use the ERP values sent in the CUS message and overwrite the changes made in ECC.
  - **Higher Value** - use the higher value of that set in ECC, and the value uploaded in the CUS message.
  - **Lower Value** - use the lower value of that set in ECC, and the value uploaded in the CUS message.
- **Allow Address Edits** - Defines if the site user can edit the addresses sent from the ERP within ECC.
- **Allow Admin Address Creation** - Defines if the site administrator can create new addresses within the admin section.
- **Allow Address Creation** - Defines if the site user can create new addresses during checkout.
- **Allow Admin Address Edits** - Defines if the site administrator can edit the addresses sent from the ERP within the admin section.

The **Options** section sets default values for specific ERP values. In most cases, the ERP data is used. If the necessary data is not set in your ERP system, the values you set in this section, override the uploaded data.

8.1.5 CXR - Upload currency exchange rates

The currency exchange rate message enables the ERP system to upload exchange rates into ECC. Within ECC, the exchange rates are used to convert between the viewing currency and the site currency. Exchange rates are not used when a product price is set in the site base currency.

ECC does not store exchange rates for the currencies that are not in use on the site.

8.1.6 SGP - Upload Stock Category Groups

This messge is used by the system to assign a product to a group. Both product and group need to exist on the site.

Note This message is tipically sent after a new product is uploaded via an STK message. It is not necessary to send this message when a product is changed or deleted. If the product is deleted, ECC also removes the catalogue entry for the product.

8.1.7 SOU - Sales order update

The SOU message notifies ECC if the status of a sales order originating from ECC changes.

If an order is placed and ECC takes payment at dispatch, the system uses the SOU message to tell ECC when the order it going to be shipped, and the values for the transaction. In the case of part shipment, this will be less than the ECC order amount.

At that point ECC tries to take the money from the payment gateway used. If ECC is able to process the payment via the payment gateway, then ECC will responds with the 200 status code. However, if the payment fails, ECC sends error code 009 - Card Error. At that point the order should not be shipped until the payment issue has been resolved. If the error response is 009, the ERP can continue send the SOU message to ECC, until the payment is taken.

For all other payment options ECC returns a status code of 200.

8.1.8 STG - Upload catalogue record

This message sends up the details used to create, change or delete a product group.

This message is only used where the ERP is able to hold the catalogue structure for the website. If the ERP does not hold the catalogue, this message is not sent.

Note TROPOS does not use this message.

To allow local changes at the ECC level you can choose which system defines master data for catalog nodes. Use the following properties to define how the STG message works:

- **Enabled** - If the STG message is enabled, the ERP status for the catalog node overwrites the local ECC setting. If set to **No**, the ECC setting is the master.
- **Group Parent** - This option controls whether the parent of the catalog node is changed on update. If you want to change the structure of the catalog within ECC and not to have it overwritten when an update is made, set this option to **No**.
- **Name** - Defines if you want to use the ERP name for the catalog node. If you want ECC to keep master data, change the setting to **No**.
- **Description** - Defines if you want to use the ERP description for the catalog node. If you want ECC to keep master data, change the setting to **No**.

- **Image Filename** - Defines if you want to use the ERP image name for the catalog node. If you want ECC to keep master data, change this setting to **No**.

If you do not want to control the catalog from your ERP system, disable this message. You can set up the catalog properties in ECC. If required, the initial catalog can be uploaded from the ERP, and then you can disable the STG message to stop further uploads for all products (including new products).

8.1.9 STK - Upload stock details

This message sends up the details used to create, change or delete a products in ECC. The STK is one of the main messages for ECC. It is used to populate products into ECC. The brand settings dictate which website a product is uploaded to. To be sold on your site, the product must have base price in that currency.

Observe the following examles:

Site	Brand	Currency
MySite1.com	Company-EPI06, Warehouse-New Jersey	USD
MySite2.com	Company-EPIC06	PESO

Product	Brands	Currency	Site Availability
SKU-001	Company-EPIC05	GBP	Not on any sites
SKU-002	Company EPIC06	USD	[1]MySite1.com, MySite2.com
SKU-003	Company-EPIC06, Warehouse-New Jersey	USD, [2]GBP, PESO	MySite1.com, [3]MySite2.com
Company-EPIC06, Warehouse-Florida	USD, GBP, PESO	[4]MySite2.com	

[1] No Warehouse details in SKU, product matches company brand settings

[2] Company doesn't match site, so GBP values not used

[3] Site doesn't have any warehouse brand settings, so matches all brand values for warehouse

[4] Warehouse doesn't match for MySite1.com

Define the following Default settings for the STK message:

- **Default Weight Value** - If the ERP does not send weight values (i.e. the value is blank), ECC can set a default value for all products. If the **Default on Zero** options is set to **Yes**, ECC replaces zero weight value (as well as blank values) with the default.
- **Hide New Products** - If set to **Yes**, when a new product is uploaded from the ERP, it is not immediately for sale.
- **UOM Filter** - Enter the list of UOMs that should not display on the website. Separate the UOMs by commas.
- **Default Tax Code** - For the default store, this is the same as the value set on the Quick Start page. The value can be set on a site by site basis if required.

Use the **Overwritten on Update** section to define which product properties are updated from the ERP (ERP is the master) and for which properties ECC is the master. You can define this property on site or store basis. For each property select one of the following options:

- **Yes** - When the STK message is uploaded, local changes are overwritten and the ERP data is the master.
- **No** - When the STK message is uploaded, all local changes within ECC are retained.

For example, if you want to have a different product description on your website (or one of your web sites), you can edit the Description field for the product using the Manage Products function. In this case, you need to set the Product Description setting to No. The local changes are not overwritten when the product is modified in the ERP and uploaded again. These values are all held on a site by site basis. For example, you can set up your B2B site to display the ERP description, and your B2C site to have a web site specific description for the product.

Note For more information on how to edit the product properties, use the Manage Products section in this guide.

Default Pricing

In general, the prices sent up in the STK message should be the default prices for the product. However, if you do not want to use this setting because of the way the price data is configured in the ERP, ECC supports the sending of an MSQ (stock enquire) message after the STK has been received. This MSQ message uses the default account settings for the site to get the correct price in the site currency. The settings for this are managed in the MSQ setup in Admin Panel > Epicor > Messaging > Request Messages, MSQ - Stock enquire message section. Set **Send MSQ after STK** to **Yes**.

8.1.10 STT - Upload stock text record

This message sends up additional text information about the specified, previously uploaded, product.

The STT message replaces information previously uploaded via an STT for a specific language. The message must include all details for images and related documents when not deleting.

Use the **Overwritten on Update** section to define which data is updated from the ERP (ERP is the master) and for which data ECC is the master. For each property select one of the following options:

- **Yes** - When the STT message is uploaded, local changes are overwritten and the ERP data is the master.
- **No** - When the STT message is uploaded, all local changes within ECC are retained.

Part V: Site Tools

Use these sections to configure the tools which help you to manage your site and improve its efficiency.

Chapter 9: Taxes

You can configure Tax usage in Epicor Commerce Connect either in the Sales settings or with the AvaTax™ third party module. Use this section to set up the required type of tax management.

9.1 AvaTax™ Extension

Use these steps to install AvaTax extension for tax management in ECC.

Note Epicor ERP 10 and Prophet 21 are integrated with AvaTax.

After you install the AvaTax extension, all shopping carts built in ECC use the Avalara tax engine for calculations, all payments are processed in ECC, and all orders are processed in your ERP system and through AvaTax, however the AvaTax Magento module does not record your sales. Additional transaction charges may apply because of the increase in transactions.

Menu Path: Admin Panel > System > Magento Connect

1. Re-enter your Login and Password if required.
2. Locate the **Install New Extensions** section. Click the Search for modules via **Magento Connect** link.
3. Search for the AvaTax module on the Magento Commerce site. Click the **Install** button to view the AvaTax extension key. Copy the key.
4. In the **Paste extension key to install** field, paste the AvaTax extension key.
5. Click the **Install** button. Review the items available for installation.
6. Click the **Proceed** button to complete the installation.

9.2 Sales Tax

All the rules for Sales Tax are maintained within the ERP system and are mapped into ECC as part of the installation. **Tax Classes** are used within the **Tax Rules** configuration. It is the **Tax Class** that is used to associate the ECC **Customer** via the **Customer Group** record back to the appropriate **Tax Rule** .

Chapter 10: Payment Gateways

Payment Gateway is a service that your site uses to accept payments from the customers during checkout.

ECC supports the following payment options:

- Payment on account for B2B customers,
- ERP processed payments using Epicor Secure Data Manager (Epicor ERP 10) / Elements (Prophet 21) for credit and debit cards,
- Payment at time of order using PayPal, PayPal Express, credit or debit card payment via a payment gateway, such as SagePay, Worldpay, Barclaycard SmartPay 3rd Party payment Gateways are available via Magento Connect,
- Pre-authorization at time of order and then payment on dispatch - this option uses the SOU message to trigger the payment.

Review the following payment gateway compatibility chart:

	Epicor ERP 10	**Prophet 21**	**Tropos**	**xVP**
Payment on Account	×	×	×	×
ERP processed card payment	Elements	ESDM		
Payment at time of order	×	×	×	×
ECC processed payment on dispatch		×	×	

The ECC site does not keep credit card details and is compliant with the PCI Standard.

Note For information on how to install payment gateway on your ECC site, refer to Epicor Commerce Connect Installation Guide.

10.1 Payment Mapping

You define Payment Mapping on the Quick Start screen when you prepare Epicor Commerce Connect for synchronization with your ERP system.

Consider the following information while setting up payment mapping:

Epicor Commerce Connect supports the following Payment Collect options:

- **Token only** - Token for the card details is available.
- **Collected** - Payment is processed.
- **Authorized** - Card pre-authorization is made, and the ERP system will processes the payment later.
- **Authorized and will capture on ship** - Card pre-authorization is made, and the payment is processed on dispatch.

The following order triggers are available:

- **Paid** - Order processing starts when the customer's payment is received.
- **Authorised** - Order processing starts when the payment amount is authorized on the customer's credit card.
- **Paid or Authorised** - Order processing starts either when the payment is received or when the payment amount is authorised on the customer's credit card.
- **Any** - Order processing starts when the order is posted.

Epicor recommends to use the following typical setting for the available Payment Methods:

Payment Method	Payment Collect	Order Trigger	GOR Payment Attribute
Payment on Account	Token only	Any	N
ERP processed card payment	Token only	Authorized	A
Payment at time of order	Collected	Paid	C
ECC processed payment on dispatch	Token only	Authorized	D

When you set up Payment Mapping in ECC Quick Start screen, you need to link the payment methods to the ERP Codes used to identify them in your ERP system.

For example, Epicor ERP 10 uses the following ERP codes:

- CA - on account payment
- ESDM - Epicor ERP 10 ESDM credit card processing and Token only because all processing is done in Epicor ERP 10
- CC - for any of the other ECC controlled Payment Gateway and Authorize and will capture on ship.

Prophet 21 uses the following ERP codes:

- CD - On account
- CC - Elements Credit Card
- CH - Check payment
- PL - PayPal payment.

10.2 Epicor Payment Module

Use this section to set up your ECC system to work with the Epicor Payment Module method.

This payment method uses the AST message to check the account status before the payment page loads. This method may not be available depending on the setting, for example, in case ECC uses Default ERP Account.

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, navigate to **Sales > Payment Methods**.
2. Expand the **Epicor Payment Module** section.
3. Set the **Enabled** field **Yes**. You can enable or disable a payment method for a store or for a site. For more information on how to define on the site or store basis, review the Site Specific Settings section earlier in this guide.
4. In the **New Order Status** field, define a status which is assigned to an order when it is created in ECC. The status is used until the ERP system sends an SOU message with a revised status.
5. In the **Title** field, enter the text that displays on the payment page of the Checkout process.
6. In the **Displayed Message** field, enter the text that displays under the payment gateway title on the Checkout page.
7. Set the **Force Default Billing Address** field to **Yes** if you do not want the customers to change the billing address. In this case, the system uses the customer's default billing address.
8. Define **Credit Options**. Use this table to decide which options to select:

Payment method available?

Epicor Payment	Setting	Credit Limit Value		
		$0	**Value**	**Blank**
Do Credit available check?	Yes	Not available	Available if available credit > cart value, otherwise not available	Available
	No	Available	Available	Available
Can place orders in negative credit? Do Credit available check must be set to Yes	Yes	Available	Available	Available
	No	Not available	Available if available credit > cart value, otherwise not available	Available
Can place orders which place in negative credit? Do Credit available check must be set to Yes	Yes	Available	Available	Available
	No	Not available	Available if available credit > cart value, otherwise not available	Available

9. Click **Save Config**.

10.3 ESDM Payment Gateway

ESDM Payment Gateway is for Epicor ERP 10 only. Use this section to set up your ECC system to work with the ESDM Payment method. To configure the ESDM Payment Gateway you need to know the URL for the live and test ESDM servers.

Note Currently ESDM only supports payment on dispatch. Pre-authorization and debiting of the card is completed by Epicor ERP 10.

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, navigate to **Sales > Payment Methods**.

2. Expand the **ESDM Payment Gateway** section.

3. Set the **Enabled** field **Yes**. You can enable or disable a payment method for a store or for a site. For more information on how to define on the site or store basis, review the Site Specific Settings section earlier in this guide.

4. In the **Title** field, enter the text that displays on the payment page during checkout.

5. Select the ESDM running **Mode**. The following options are available:

   - **Demo Mode** does not capture any card details and does not connect with ESDM. Tokens that are sent to the ERP are not valid ESDM tokens. This mode is used when demonstrating ESDM without internet connectivity.

- **Test Mode** uses the test URL for communication. Typically this would be used on for the test web site. This mode can be used to check the functionality of ECC, ESDM and card payments normally, without debiting the cards.
- **Live Mode** is used for live web sites where the card details need to be held and processed.

6. In the **New Order Status** field, define a status which is assigned to an order when it is created in ECC. The status is used until the ERP system sends an SOU message with a revised status.
7. In the **Payment Card Types** field, select which card types are accepted for payment. To select multiple types, use **Shift+Click** and **Ctrl+Click**.
8. Use the **Sort Order** to rank the payment methods on the payment page during checkout.
9. Set the **Advanced Settings** field to **Yes** if you want to specify additional details such as the URLs for the live and test ESDM connections. These settings are not site or store specific. All sites use the same ESDM repository for tokens.
10. Click **Save Config**.

10.4 VeriFone Payment Gateway

Use this section to set up your ECC system to work with the VeriFone Payment method. To configure the VeriFone Payment Gateway, you need to know the URL for the live and test VeriFone servers, as well as the VeriFone account IDs.

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, navigate to **Sales > Payment Methods**.
2. Expand the **VeriFone Payment Gateway** section.
3. Set the **Enabled** field **Yes**. You can enable or disable a payment method for a store or for a site. For more information on how to define on the site or store basis, review the Site Specific Settings section earlier in this guide.
4. In the **Title** field, enter the text that displays on the payment page during checkout.
5. Select the VeriFone running **Mode**. The following options are available:
   - **Demo Mode** does not capture any card details and does not connect with VeriFone. Tokens that are sent to the ERP are not valid VeriFone tokens. This mode is used when demonstrating VeriFone payments without internet connectivity.
   - **Test Mode** uses the test URL for communication. Typically this would be used on for the test web site. This mode can be used to check the functionality of ECC, VeriFone and card payments normally, without debiting the cards.
   - **Live Mode** is used for live web sites where the card details need to be held and processed.
6. Select one of the following **Payment Action** options:
   - **Authorize Only** - select this option to authorize the payment on checkout, and complete the payment on dispatch.
   - **Authorize and Capture** - select this option to withdraw the payment from the customer's card on checkout.

7. Set the **Part Payments Enabled** field to **Yes** if you want to support payment on dispatch for part orders. You must check with VeriFone that your account is configured for part payment.

   Note Transactions over the initial authorized amount are sent without a CVC/CVV code, so the liability for charge backs may shift. You must verify with VeriFone and your merchant provider that you can use this option.

8. Set the **AVS Validation Enabled** field to **Yes** if you want to require address code validation on checkout.

9. Set **Refunding Enabled** to **Yes** if you want to enable refunds processed by ECC to be refunded to the card.

10. In the **New Order Status** field, define a status which is assigned to an order when it is created in ECC. The status is used until the ERP system sends an SOU message with a revised status.

11. In the **Payment Card Types** field, select which card types are accepted for payment. To select multiple types, use **Shift+Click** and **Ctrl+Click**.

12. Use the **Sort Order** to rank the payment methods on the payment page during checkout.

13. Set the **Use Proxy** field to **Yes**, if you want to enable the ECC to communicate via a proxy server.

14. In the **Account Settings** and, enter data provided by VeriFone.

15. Use the **Payer Auth Settings** section to define to select which cards are payer authenticated. If you want to define these properties, set the **Payer Auth Enabled** field to **Yes** and select the card types.

    Note These settings vary from card to card. Check the details with your merchant provider and VeriFone.

16. Set the **Advanced Settings** field to **Yes** if you want to define additional VeriFone properties:

    a. In the **Test URL**, enter the VeriFone URL for test connection. These details are provided by VeriFone when the account is approved.

    b. In the **Live URL**, enter the VeriFone URL for live connection. These details are provided by VeriFone when the account is approved.

    c. Review the values in the **Allowed Transaction Results**, **Allowed CVC Results**, **Allowed Address AVS Results**, and **Allowed Postcode AVS Results** fields. These values must not be changed.

    d. In the **Keep Orphaned transaction Logs For x Days** field, specify the period during which the transactions that are not associated with an order are kept in the VeriFone log. To access the log, navigate to Admin Panel > Sales > Verifone > Transactions.

17. When complete, click the **Save Config** button.

10.5 Elements Payment Gateway

Use this section to set up your ECC system to work with the Elements Payment method.

Note Currently Elements only supports payment on dispatch. Pre-authorization and debiting of the card is completed by Prophet 21.

Menu Path: Admin Panel > System > Configuration

1. In the **Configuration** pane, navigate to **Sales > Payment Methods**.
2. Expand the **Elements Payment Gateway** section.
3. Set the **Enabled** field **Yes**. You can enable or disable a payment method for a store or for a site. For more information on how to define on the site or store basis, review the Site Specific Settings section earlier in this guide.
4. In the **Title** field, enter the text that displays on the payment page during checkout.
5. Select the Elements running **Mode**. The following options are available:
   - **Demo Mode** does not capture any card details and does not connect with Element. Tokens that are sent to the ERP are not valid Element tokens. This mode is used when demonstrating Element payments without internet connectivity.
   - **Test Mode** uses the test URL for communication. Typically this would be used on for the test web site. This mode can be used to check the functionality of ECC, Element and card payments normally, without debiting the cards.
   - **Live Mode** is used for live web sites where the card details need to be held and processed.
6. In the **New Order Status** field, define a status which is assigned to an order when it is created in ECC. The status is used until the ERP system sends an SOU message with a revised status.
7. Use the **Sort Order** to rank the payment methods on the payment page during checkout.
8. In the **Account Settings** and **Application Settings** sections, enter data provided by Element support.
9. Define Terminal Settings:
   a. Enter the **Terminal ID** provided by Elements support.
   b. Set the **AVS Validation Enabled** field to **Yes** if you want to use address validation.
   c. Set the **CVV Validation Enabled** field to **Yes** if you want to apply additional checks to credit card processing.
10. Set the **Advanced Settings** field to **Yes** if you want to additional Elements properties such as the allowed AVS and CVV results. The Advanced Setting section allows the site owner to apply additional checks to card processing. The options available are standard card processing choices. Any changes to these values should be discussed with the gateway provider.

    Note Epicor recommends to use Advanced Settings only if you are familiar with Elements card processing options.
11. When complete, click **Save Config**.

Chapter 11: Promotions

You can use the Promotions option to create catalog and shopping cart price rules which may involve a wide range of discounts.

11.1 Shopping Cart Price Rules

Use the Shopping Cart Price Rules functionality to create order discounts and special offers and tailor them to suit specific requirements.

Follow these steps to create a new shopping cart price rule.

Menu Path: Admin Panel > Promotions > Shopping Cart Price Rules

1. Click the **Add New Rule** button at the top of the page.

2. Enter Rule Information:

    a. Enter **Rule Name** and **Description**.

    b. Define the new rule **Status**. You can select **Active** to make this rule available for the customers as soon as you create it or select **Inactive** and activate the rule later.

    c. In the **Websites** field, select a website or several websites in which you want to apply the rule. To select several websites, hold down the **Shift** key and click the required site names.

    d. Select the **Customer Groups** that are eligible for the discount.

    e. Use the **Coupon** field to define if the rule allows the customers to use a coupon for discount.

    f. Optionally, use the **From Date** and **To Date** fields to define the period of the discount rule validity.

3. Define Conditions:

    a. In the **Shopping Cart Price Rule** pane, click **Conditions**.

    b. Click the **Plus** sign to select the conditions the order must fulfil to be eligible for a discount or special offer.

    Note You can change different condition elements from the drop-down lists that display. All condition parts that are bold and subscribed can be modified. If you want to delete a condition or its part, use the red **X** sign next to it.

4. Specify required Actions:

    a. In the **Shopping Cart Price Rule** pane, click **Actions**.

    b. Define the actions that must be performed to the order price if the order fulfils specified conditions. In the **Apply** field, select the type of action that must be performed to the order price and adjust the rest of the fields according to the price rule.

    c. Optionally, use lower pane to add more conditions if you wan to apply the rule only to cart items.

5. If you want to use coupons as a part of your discount rule, enter the coupon information:

   a. In the **Shopping Cart Price Rule** pane, click **Manage Coupon Codes**.

   b. In the **Coupon Qty** field, enter the discount quantity.

   c. Specify the **Code Length** and **Code Format**.

   d. Optionally, define additional code format properties, like **Code Prefix**, **Code Suffix** and **Dash Every X Characters** value.

   e. Click the **Generate** button.

6. Click the **Save** button at the top of the page.

11.2 Catalog Price Rules

Use the Catalog Price Rules functionality to create product discounts and special offers and tailor them to suit specific requirements.

Follow these steps to create a new catalog price rule.

Menu Path: Admin Panel > Promotions > Catalog Price Rules

1. Click the **Add New Rule** button at the top of the page.

2. Enter Rule Information:

   a. Enter **Rule Name** and **Description**.

   b. Define the new rule **Status**. You can select **Active** to make this rule available for the customers as soon as you create it or select **Inactive** and activate the rule later.

   c. In the **Websites** field, select a website or several websites in which you want to apply the rule. To select several websites, hold down the **Shift** key and click the required site names.

   d. Select the **Customer Groups** that are eligible for the discount.

   e. Use the **Coupon** field to define if the rule allows the customers to use a coupon for discount.

   f. Optionally, use the **From Date** and **To Date** fields to define the period of the discount rule validity.

3. Define Conditions:

   a. In the **Catalog wPrice Rule** pane, click **Conditions**.

   b. Click the **Plus** sign to select the conditions the product must fulfil to be eligible for a discount or special offer.

      Note You can change different condition elements from the drop-down lists that display. All condition parts that are bold and subscribed can be modified. If you want to delete a condition or its part, use the red **X** sign next to it.

4. Specify required Actions:

   a. In the **Catalog Price Rule** pane, click **Actions**.

b. Define the actions that must be performed to the price if the product fulfils specified conditions. In the **Apply** field, select the type of action that must be performed to the product price and adjust the rest of the fields according to the price rule.

5. Click the **Apply Rules** button at the top of the page to apply the new rules.

Chapter 12: Manage ERP Accounts

You can view the ERP accounts after you ECC site is synchronized with your ERP system. Use this functionality to validate data transfer. Epicor recommends not to change the ERP accounts information on ECC site to ensure consistency of data between ECC and your ERP system.

Use these steps to view the ERP accounts information.

Menu Path: Admin Panel > Customers > ERP Accounts

1. The list of the transferred supplier and customer records from the ERP system displays. The **ERP Account Type** column indicates if the account is a customer or a supplier.

2. Click the row of the ERP account you want to view.

3. Select the available entries in the **ERP Account** column to view the transferred details for the selected customers.
   - **Details** - view dynamically populated data such as account balance and credit limit. The appearance of this window depends on the type of account.
   - **Addresses** - view address information stored on the ERP account.
   - **Customers** - view the web users that are associated with the selected ERP account.
   - **Message Log** - use this window to track the messages between the ERP system and EEC.

4. If your ERP system does not support Upload Customer Part Number (CPN) message, you can use ERP Accounts functionality to define customer specific SKUs.

Chapter 13: Create Accounts and Contacts

You can create ECC accounts and contacts in several ways.

When an ERP account and contacts are uploaded, ECC creates the ERP Account and all the contacts required for that account in the ECC system.

You can create new contacts on ECC site in the Customer Connect > Account Information section. Any contacts created here are written back to the ERP system and created in ECC.

Note Not all ERPs support this ability.

New B2B accounts can be created from the Login Page. The following options are available:

- The ERP account Pre reg Password can be used for login. If the new contact uses the pre reg password provided by ECC admin, the new contact is automatically associated with the correct ERP account.

  Note Pre-reg Passwords are stored in the Admin Panel > Customers > ERP Accounts screen.

- If a new ERP account is required, the new contact can request a business account on the Login Page. They will be associated with the default account until the ERP account is created manually in the Admin Panel > Customers > ERP Accounts screen. Review the Manage ERP Accounts section in this guide for more information.
- If your ERP system supports the CNC message and the site uses it, the ERP account is created in the ERP and uploaded to ECC.

Chapter 14: Manage Products

You can view the products after you ECC site is synchronized with your ERP system. Epicor recommends not to change the product properties uploaded to the ECC site to ensure consistency of data. However, you can change the product properties if you want them to differ from your ERP data. For more information on how to avoid ERP changes overwriting the ECC changes, review the Upload Messages section in this guide.

Use these steps to define additional product properties in ECC.

1. In Admin Panel, navigate to **Catalog > Manage Products**. The list of uploaded products displays.

2. Click the line of the product, for which you want to define additional properties.

3. The **General** sheet displays data uploaded from your ERP system. Depending on the associated ERP system, the amount of information populated in this window may differ. You can use these fields to enter additional information for the product. For example, you can enter a product description for use on a website in the Description field.

4. Upload an Image for the product:

   Note Skip this step if your ERP system is set up to upload images to the ECC site. For more information on how to upload images to your ECC site, refer to the Images section in this guide.

   a. In the **Product Information** pane, click **Images**.

   b. Click the **Browse Files** button and select an image for the product. Click **Upload Files**. The images associated with products are automatically re-sized by the software for the different aspects of use:

      - **Thumbnail** - used in Shopping Cart,
      - **Small Image** - used in the Category listing, Wish List and so on,
      - **Base Image** - large product image used when zooming into detail.

      Note Epicor recommends to use high-resolution images to obtain the best use of the Zoom functionality.

5. Configure additional offers:

   a. In the **Product Information** pane, click **Related Products**.

   b. To add a product, select **Any** from the drop-down menu in the left column and click the **Search** button.

   c. In the list of products that displays, select the check boxes for the products to display as Related Products for the product you are editing.

   d. Click **Save**.

   e. If you want to add Cross-Sell and Up-Sell products, perform the same actions in the **Up-sells** and **Cross-sells** lists.

6. Define the Category of the product.

   a. In the **Product Information** pane, click **Categories**.

b. In the **Product Categories** list select the check boxes for the categories ans subcategories to which you want to assign the product.

c. Click **Save**.

Chapter 15: Upload Images

Use this section to upload the images from your ERP system to the ECC site.

Note The images you want to upload to ECC must have lower-case names and extensions.

1. If the ERP system sends the names of the product images to ECC in the STK message, you need to copy the images into the ECC directory for the system to be able to use them. Use these steps to define the image directories in ECC and upload the images:

   a. In Admin Panel, navigate to **System > Configuration > Epicor Configuration > Networking and General**.

   b. Expand the **Media / Asset Settings** section.

   c. Enter the required locations in the **Category Asset Image Directory**, **Product Asset Image Directory** and **Product Asset Related Document Directory** fields.

   d. Copy the images for your products to the specified folders. You can do this before of after uploading products. ECC automatically creates thumb nails and small images from the original high resolution images.

   e. Click **Save Config**.

2. If your ERP system does not upload the image names to ECC, you need to assign the images manually. Use these steps to assign an image to a product:

   a. In Admin Panel, navigate to **Catalog > Manage Products**.

   b. Click the product for which you want to assign an image. In the **Product Information** pane, click **Images**. If the ERP has sent the image name to ECC, you can see it in the **ERP Images** section.

   c. Click the **Browse Files** button and select the image files to upload for the product. When you select all the images, click the **Upload Files** button. ECC automatically creates thumb nails and small images from the original high resolution images.

   d. When complete, click the **Save** button.

Chapter 16: Maintenance Tasks

Use this section to maintain your Epicor Commerce Connect application.

16.1 Install Latest Updates

When ECC upgrades are released, a notification displays in the notifications bar stating that an upgrade is available. Use these steps to download and install latest Epicor Commerce Connect updates.

Menu Path: Admin Panel > System > Magento Connect > Magento Connect Manager

1. Re-enter your **Login** and **Password** if required.
2. In the **Manage Existing Extensions** section, click the **Check for Upgrades** button. The **Channel: Magento Community Edition** list displays the modules that have upgrades available highlighted in yellow.
3. Use the **Action** column to select the required updates for the available modules.
4. When all required actions are defined, click the **Commit Changes** button.

16.2 Caching

Caches are maintained automatically by the Magento and ECC processes and help to improve the system performance. You may need to use Cache Management if a notification that the caches are invalidated display at the notifications bar.

16.2.1 Magento Core Caches

Use these steps to manage Magento core caches.

Menu Path: Admin Panel > System > Cache Management

1. Verify the following caches are enabled:
   - **Configuration** - All configuration is kept in XML files and database table core_config_data. Data from these files and table is collected, merged and saved in the cache.
   - **Layouts** - Layouts are XML instructions of blocks combinations.
   - **Blocks HTML Output** - Caches HTML output from blocks.
   - **Translations** - Translations are collected and merged from locale files and core_translate database table.
   - **Collections Data** - If enabled, Magento internal object collections will be cached according to specific cache id logic for each collection.
   - **EAV types and attributes** - Entity types declaration cache.
   - **Web Services Configuration** - Web Services definition files (api.xml) and Web Services definition files (api2.xml).
2. If the system indicates any of these caches is invalidated, select the check box of this cache and from the **Actions** drop-down list at the top, select **Disable**. Click the **Submit** button.

   Note You can also use the Refresh action. In this case, all cache is cleaned, but all enabled aspects remain enabled.

16.2.2 ECC Caches

Use these steps to manage ECC caches. These are optional caches that can be enabled to improve performance.

Menu Path: Admin Panel > System > Cache Management

1. Review the following caches:
   - **Message Cache** - Contains data relating to messages (only used by MSQ at present). For most sites this cache should be enabled. You can set the values for this cache in Admin Panel > Epicor > Messaging > Networking and General, Cache Settings section. Unless ERP prices change several times a day, or there is significant stock movement on a site, the cache settings should be set for several hours. It is good practice to refresh the cache every 24 hours.
   - **Access Rights Cache** - Contains data relating to access rights.
   - **Customer Connect Cache** - Contains search data and other data related to customer connect pages.
   - **Supplier Connect Cache** - Contains search data and other data related to supplier connect pages.

2. If the system indicates any of these caches is invalidated, select the check box of this cache and from the **Actions** drop-down list at the top, select **Disable**. Click the **Submit** button.

   Note You can also use the Refresh action. In this case, all cache is cleaned, but all enabled aspects remain enabled.

16.3 Indexes

Indexes are maintained automatically by the Magento and ECC processes and help to improve the system performance. You may need to use Index Management if a notification that the indexes are invalidated display at the notifications bar.

Menu Path: Admin Panel > System > Index Management

1. Review the following indexes:
   - **Product Attributes** - Index product attributes for layered navigation building.
   - **Product Prices** - Index product prices.
   - **Catalog URL Rewrites** - Index product and categories URL rewrites.
   - **Product Flat Data** - Reorganize EAV product structure to flat structure.
   - **Category Flat Data** - Reorganize EAV category structure to flat structure.
   - **Category Products** - Indexed category/products association.
   - **Catalog Search Index** - Rebuild Catalog product fulltext search index.
   - **Stock Status** - Index Product Stock Status.
   - **Tag Aggregation Data** - Rebuild Tag aggregation data.

2. If the system indicates any of these indexes is invalidated, select the check box of this index and from the **Actions** drop-down list at the top, select **Reindex Data**. Click the **Submit** button. Reindexing can take some time depending on how many products you have in the system.

   Note You can also use the Enable and Disable actions, however Epicor recommends that your indexes should be enabled.

16.4 Notifications

From time to time, when logging into the Admin Panel, you may get modal pop-ups that notify of processes happening in the system. You can maintain these pop-ups in the Notifications screen. The screen displays system messages that indicate if there is an issue with data or there are connectivity issues within the System. Depending on the severity indicated these may or may not require action.

Menu Path: Admin Panel > System > Notifications

The following columns display the message properties:

1. **Severity** - defines how important the message is.
2. **Date Added** - the date when the issue occurred.
3. **Message** - the message details.
4. **Actions** - the actions you can perform to the issue. These include:
   - Read Details
   - Mark as Read
   - Remove.

16.5 Search Terms

The Search Terms list displays all of the search query terms that have been submitted by visitors to your store. Each term in the list can be edited, and new terms can be added to the list.

Menu Path: Admin Panel > Catalog > Search Terms

1. People may use different terminology to describe the same product. You can create additional search terms and direct people to the most closely matching products in your catalog. To add a search term:
   a. Click the **Add New** button.
   b. In the General Information section, in the **Search Query** box, enter the word or phrase that you want to add as a new search term.
   c. Select the **Store** where the search term will be used. If your store is available in multiple languages, select the applicable store view.
   d. In this term is a synonym for another search term, enter the other term in the **Synonym For** field. Any search for the synonym will be automatically redirected to the page for the other term.
   e. To redirect the search results to another page in your store, or to another website, enter the full URL of the target page in the **Redirect URL field**.
   f. If you want this term to be available for use as a suggestion whenever a search returns no results, set **Display in Suggested Terms** to **Yes**.
   g. Click the **Save Search** button.

2. To delete a search term:
   a. In the list, select the check box of the term you want to delete.

b. In the **Actions** drop-down list, select **Delete**.

c. Click the **Submit** button.

Part VI: Site Appearance

Use this section to customize the way your e-commerce site looks for the customers. You can set up different appearance for each site and store you have.

ECC offers three options for theming your web site:

- You can use **Flexi Themes** included in ECC package. Epicor Flexi Themes are a powerful tool that enables you to adjust the site style and physical arrangement according to your needs and preferences. The Configure Flexi Themes section describes how to handle ECC flexi themes.
- You can create your own theme from Epicor Flexi Themes templates and layouts. Review the Create Your Own Theme section for more information.
- You can buy a Third Party theme and apply it to your ECC installation. If you choose to use a Third Party theme, you need to make sure that its template conforms with ECC template modifications. Review the Using Third Party Themes section in this guide for more information.

Important If you have been using any theme for your default store in Magento before installing ECC and you want to continue using it, you need to reset the Default package Name value after you install ECC. For more information, refer to the Reset Theme for Default Store section later in this guide.

Reset Theme for Default Store

When you install ECC on existing Magento environment, the default store theme changes to Flexi Theme. If you want to continue using a theme you had previously, you need to reset the Default Package Name value.

Menu Path: Admin Panel > System > Configuration

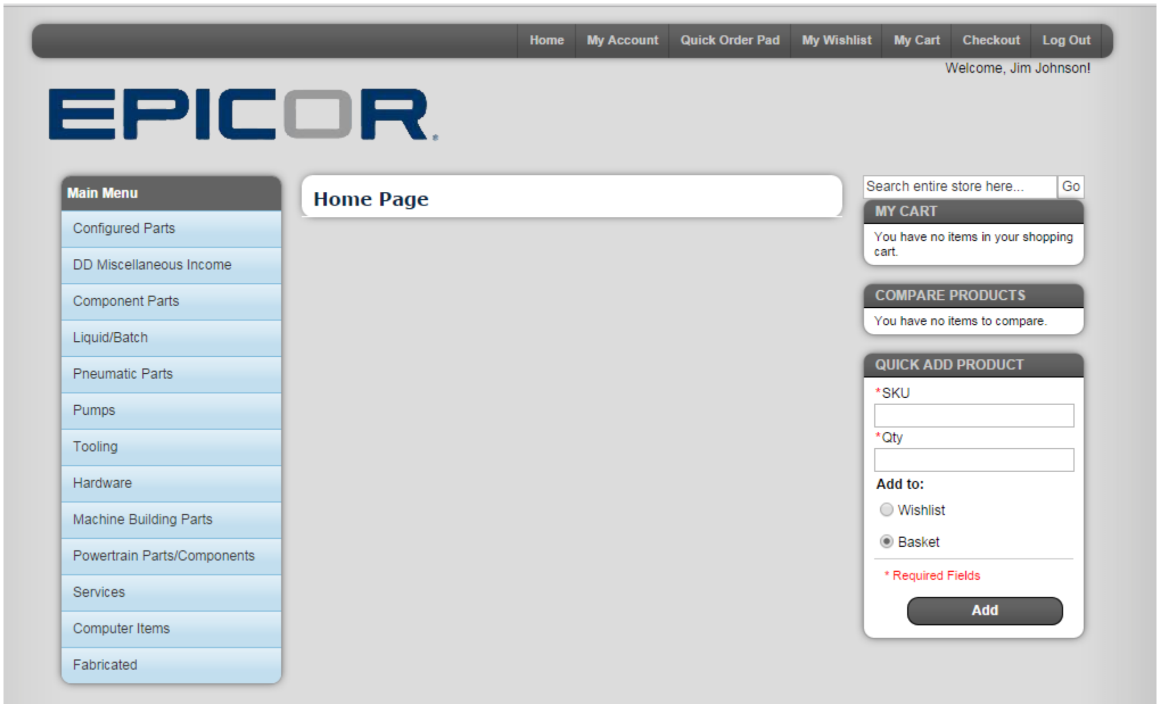
1. From the **Current Configuration Scope** drop-down, select **Default Store View**.
2. In the **Configuration** pane, under the **General** title, click **Design**.
3. In the **Current Package Name** field, enter the name of the package you want to use for default store.
4. Click the **Save Config** button.

Chapter 17: Configure Flexi Themes

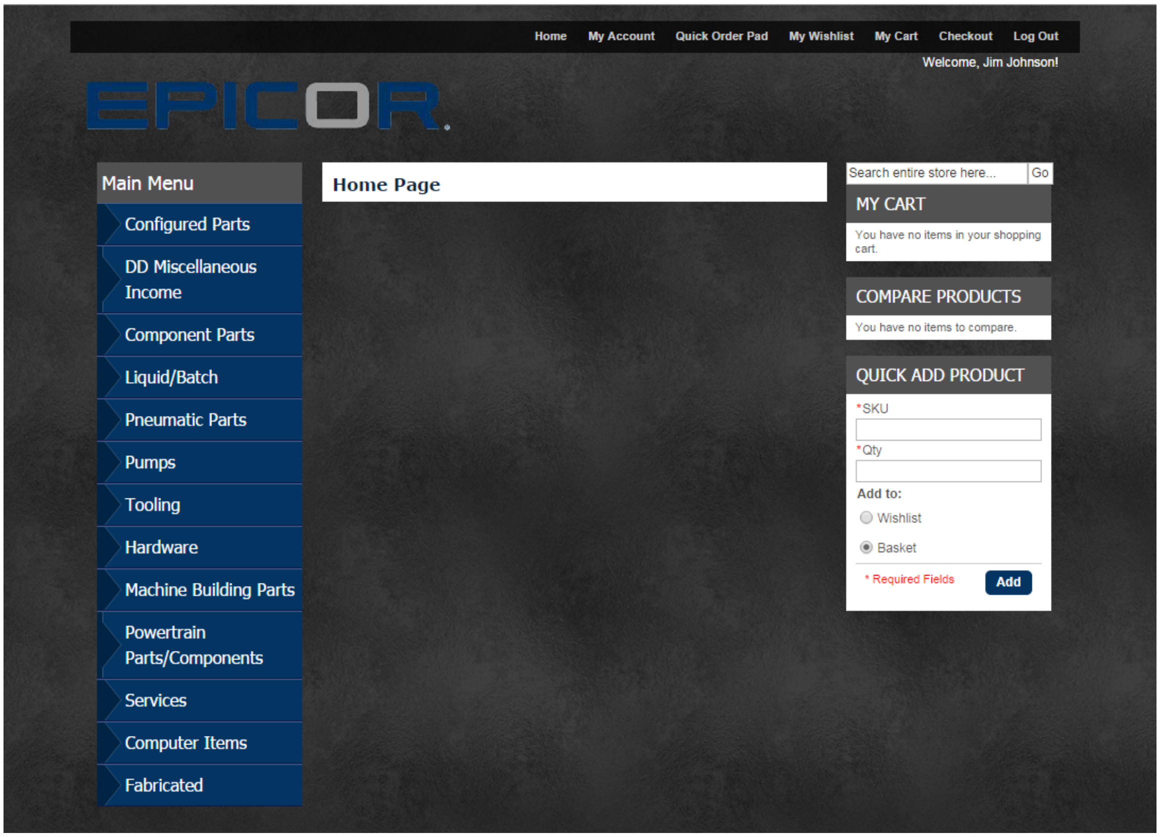
Use this section to configure Flexi Themes and enhance the design of the Epicor Commerce Connect site.

The Flexi Theme within Epicor Commerce Connect consists of three default website templates that differ in style and layout, and can be personalized to suit individual requirements:

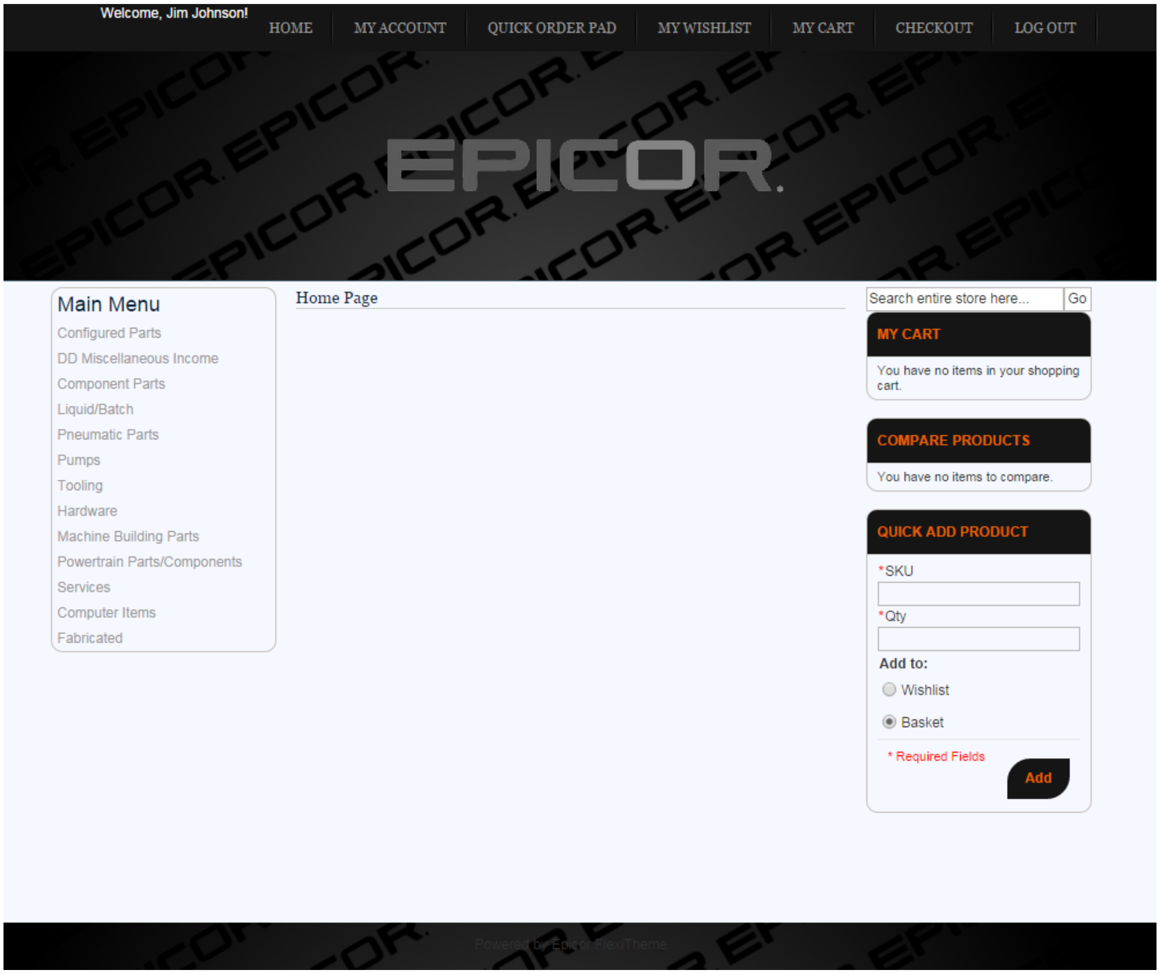
- FlexiTheme 1 - Silver Grey



- FlexiTheme 2 - Graphite



- FlexiTheme 3 - Coal Black



Two aspects of Flexi Themes change the site appearance:

- **Skins** change the style and image of the website
- **Layouts** change the website physical arrangement.

17.1 Activate Flexi Theme Skin

Use these steps to edit Flexi Theme skin for your site.

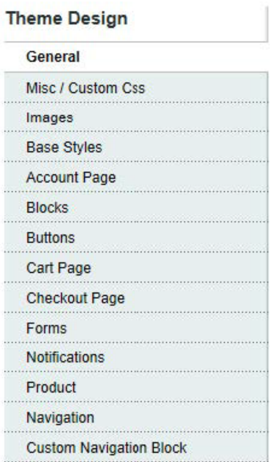
Menu Path: Admin Panel > Flexi Theme > Theme > Skins

1. Review the list of available templates. Your screen may look similar to the following:

2. In the **Action** column, click the down arrow to the left or the flexi theme skin you want to use for your site. Select **Edit**.

3. The **Flexitheme Scope Editor** list displays. Select the check boxes for the **Stores** in which you want to use the activated flexi theme skin.

4. When you activate a skin, a menu with various elements of the skin design displays in the left pane. Your menu may look similar to the following:



Skin design consists of these elements:

- **General** - on this sheet, you can rename the imported theme from the default name provided.
- **Misc/Custom CSS** - on this sheet, you define custom Cascading Style Sheets for the site, including such elements as Background, Border and Font.
- **Images** - use this sheet to upload Logo and Pagination Toolbar images for your site.
- **Base Styles** - use this sheet to define the styles for page frame work, Page Background, Header Section, Main Content Section with Left Column, Right Column and Center Column, and Footer Section as well as set the default font, link and page title styles
- **Account Page** - use this sheet to define the style for the accounts page.
- **Blocks** - use this sheet to define the styles for default styles page blocks such as Basket, Wishlist, Compare Products and Recently Viewed Products.
- **Buttons** - use this sheet to define the styles for the available buttons in ECC.
- **Cart Page** - use this sheet to alter the style for the cart page.
- **Checkout Page** - use this sheet to alter the style for the checkout page.
- **Forms** - use this sheet to define the style for the Login, Error and Contact Us pages.
- **Notifications** - use this sheet to define the style for the notification messages within ECC.
- **Product** - use this sheet to define the style for the components available on the Product page.
- **Navigation** - use this sheet to define the styles for the navigation components available within ECC.
- **Custom Navigation Block** - use this sheet to define the styles for the custom navigation blocks created in the flexitheme (FlexiTheme > Blocks > Navigation).

17.2 Edit Flexi Theme Skin

Use these steps to edit the elements of the flexi skin design using the following tools: Background, Border and Font.

Menu Path: Admin Panel > Flexi Theme > Theme > Skins

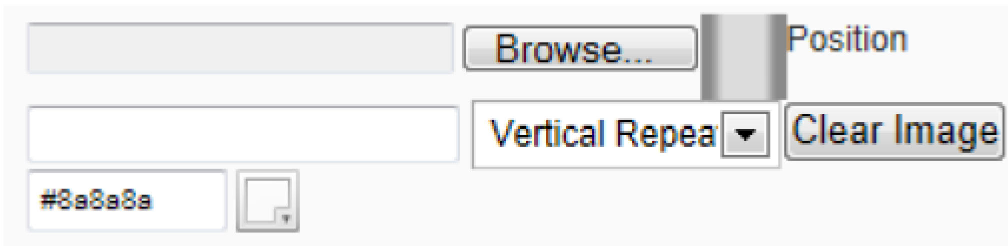
1. Click the skin you want to edit.

2. Navigate through the layout elements in the **Theme Design** pane and set up design properties using the tools described below.

3. The **Background** option allows you to change the background displayed on specific elements, for example, a page or a button. To change the Background:

a. If you want to use an image as a background, click **Browse** to select a file. Use the drop-down list to select whether you want the image to be repeated horizontally or vertically. Click the **Position** icon to preview the image appearance. You can also use the **Clear Image** button to delete existing background if you want to use another image or a color.

Your screen may look similar to the following:

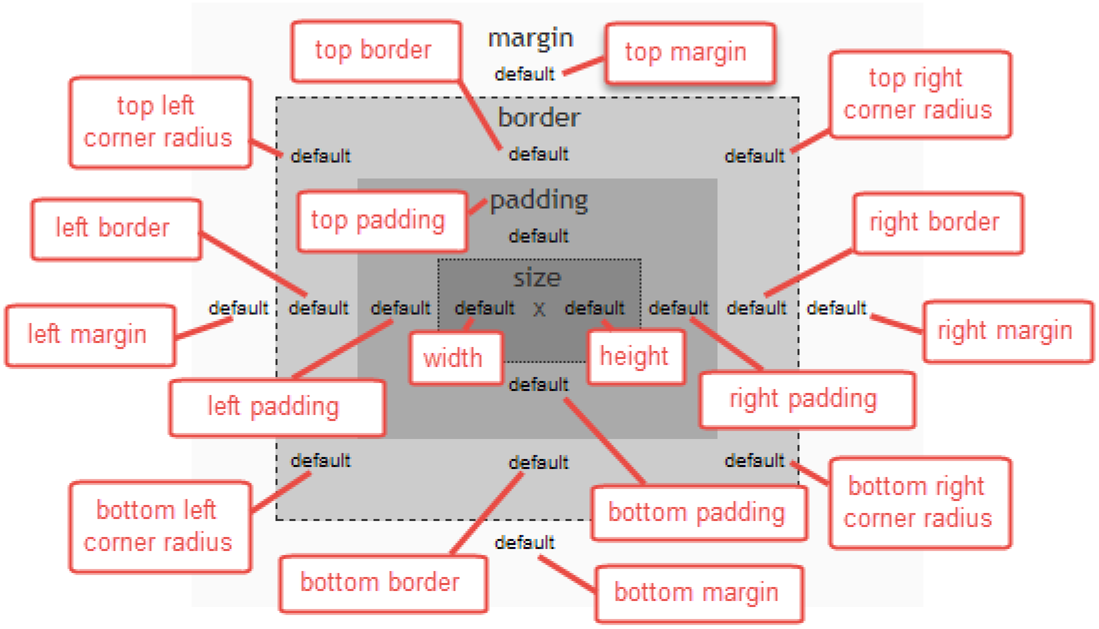


b. If you want to use a color as a background, click the **Palette** icon to select it. You can also enter the color code in the field to the left of the Palette icon.

Your screen may look similar to the following:

4. The **Border** tool allows you to change the appearance of different elements by modifying their margins, borders, corner radius, padding, width and height.

You can adjust all **default** values as required:



- **margin** - specify the distance between the element and other page content,
- **border** - specify the border width; to change the border color, click the value and select the color you want to use on the palette,
- **padding** - specify the distance between the central part of the element and the border,
- **size** - specify the width and the height of the element central part.

5. The **Font** tool allows you to adjust the text font properties, such as font family, size, weight, text decoration and color. Your screen may look similar to the following:

17.3 Activate Flexi Theme Layout

Use these steps to activate Flexi Theme layout to use for your store or website.

Menu Path: Admin Panel > Flexi Theme > Theme > Layouts

1. Review the list of available templates. Your screen may look similar to the following:

2. In the **Action** column, click the down arrow to the left or the flexi theme layout you want to use for your site. Select **Activate**.

3. The **Flexitheme Scope Editor** list displays. Select the check boxes for the **Stores** in which you want to use the activated flexi theme layout.

4. When you activate a layout, a menu with various elements of the Layout displays in the left pane. Your menu may look similar to the following:

Use the menu items to set up layouts for various pages of your site.

17.4 Edit Flexi Layout

Use these steps to edit flexi layout for your site.

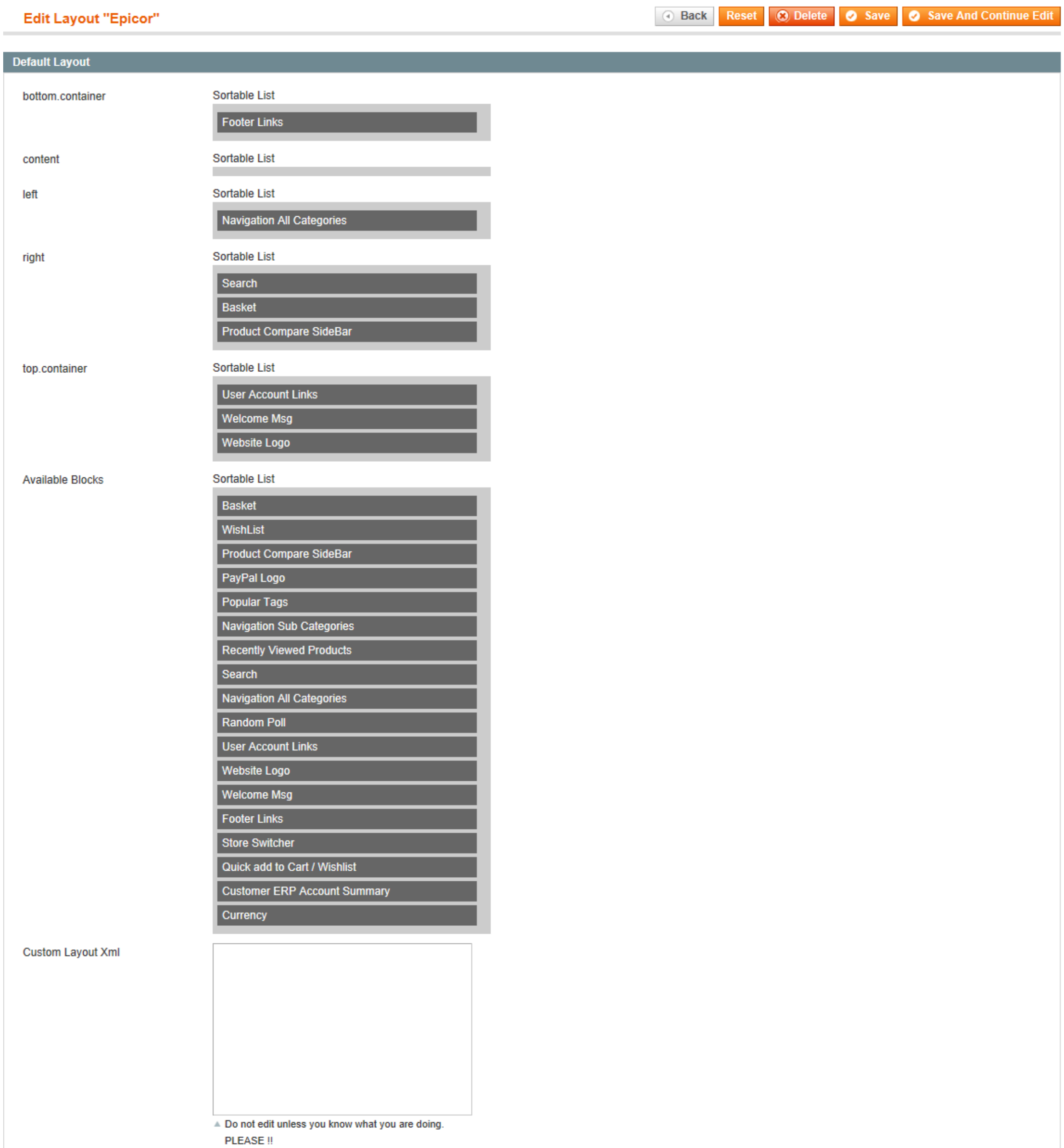
Important When you change the layout, you need to re-activate it for the changes to take effect. For more information on how to activate the layout, review the Activate Flexi Theme Layout earlier in this guide.

Menu Path: Admin Panel > Flexi Theme > Theme > Layouts.

1. Click the name of the layout you use.

2. On the menu, select Default Layout.

Your screen may look similar to the following:



3. Drag a block from the **Available Blocks** list and drop it into a site section where you want it to appear. The available site sections include:

   - bottom.container
   - content
   - left
   - right
   - top.container.

   Repeat this step for all the site sections you want to populate.

4. Navigate to the **Product Details Layout** page.

5. From the **Layout** drop-down, select one of the available layout types:
   - 1 Column
   - 2 Column
   - 2 Column Right
   - 3 Column.

6. Populate the site sections below with available blocks.

7. Create layouts for the rest of the pages.

17.5 Create Callout Block

Use these steps to create callout blocks for your site. You can be place callouts on the web page to draw attention to specific products or promotions depending on the style created.

Menu Path: Admin Panel > Flexi Theme > Blocks > Callouts.

1. Click the **Add Callout Block** button.

2. Define callout properties:

   a. Enter a suitable **Name** for the new callout.

   b. From the **Type** drop-down, select the required type for the callout. Available options include:

      - **Callout:** This relates to an image that will display within the box. Note that callouts can be used in the Slider option.
      - **Featured Product:** This will populate the Callout with the details on a specific product when the code is added to the **Product SKU** field in the configuration.
      - **Custom HTML:** Use the **Custom HTML** editor to add text and images to the Callout with this option.

   c. Adjust the fields according to the type of the callout you want to create.

3. Click **Save**.

17.6 Create Slider Block

Use these steps to create slider blocks for your web site. You can use sliders to create a slide show of images or information to advertise products or business.

Menu Path: Admin Panel > Flexi Theme > Blocks > Sliders.

1. Click the **Add Slider Block** button.

2. Define slider properties:

   a. Enter a **Name** for the new slider.

   b. In the Transition Effect, select an effect you want to use. Available options include:

      - Fade Out

- None
- Scroll Left
- Scroll Right
- Slide On
- Slide Off.

c. Enter **Display Time** and **Transition Time** for the element.

d. Select if you want to **Show Controls** of the slide show to the users.

e. Use the **Show in Random Order** drop-down to specify if you want the slides to display in random order.

f. Click **Save and Continue Edit**.

3. Add callouts into slider:

a. Click the **Section** option in the left pane.

b. Select the check boxes for all callouts you want to use in your slider.

c. Click **Save**.

17.7 Create Navigation Block

Use these steps to create navigation blocks. You can use navigation blocks to create additional navigation on the site for users to access internal or external links or pages.

Menu Path: Admin Panel > Flexi Theme > Blocks > Navigation.

1. Click the **Add Navigation Block** button.
2. Enter a **Name** and **Block Identifier** for the new block.
3. Click **Save and Continue Edit**.
4. Click the **Links** option in the left pane.
5. Select the check boxes for all the links you want to be associated with the block. These may be links to CMS Pages, pages within the website, or specific links.
6. Use the right pane to define the sequence in which the links display in the block, for example, enter 10 for the link you want to display as the first one.
7. Click **Save**.

17.8 Create Navigation Link

Use these steps to create navigation links. You can use these links in navigation blocks.

Menu Path: Admin Panel > Flexi Theme > Blocks > Navigation Links.

1. Click the **Add Navigation Link** button.

2. Enter a **Display Title** for the new navigation link.
3. Optionally, use the **ToolTip Title** field to define how the link appears when the cursor is placed over it.
4. Enter a **Custom URL** associated with this link.
5. Click **Save**.

Chapter 18: Create Your Own Theme

If you want to create a unique style for your e-commerce site, you can use ECC templates and layouts to build your own theme .

ECC provides you with the source code of such theming elements as layouts and templates. You can find them at the following locations:

```
app/
  design/
    frontend/
      base/
        default/
          layout/
             b2b.xml
             customerconnect.xml
             elements.xml
             ecpicor_comm.xml
             epicor_common.xml
             epicor_faqs.xml
             esdm.xml
             pay.xml
             quickorderpad.xml
             quotes.xml
             supplierconnect.xml
             verifone.xml
          template/
             b2b/
             customerconnect/
             elements/
             epicor/
             ecpicor_comm
             epicor_common
             esdm/
             pay/
             productfeed/
             quickorderpad/
             quotes/
             supplierconnect/
             verifone/
```

When your own template is ready, you can import it into your ECC installation and use the ECC Conflict Checker to verify if it is fine to install it for your e-commerce sites. Review the Use ECC Conflict Checker section for more information.

Chapter 19: Using Third Party Themes

This section contains important information regarding Third Party themes usage in your ECC installation.

ECC templates are enhanced to support e-commerce functionality that does not exist in Magento, for example, such modules as Customer Connect and Supplier Connect. Some layouts, like Catalog List or Product View are modified for better performance. When you apply a Third Party theme in you ECC installation, it may override ECC templates which causes loss of logic.

After you import a new Third Party template into your ECC installation, you can use the ECC Conflict Checker to verify if it is fine to install it for your e-commerce sites. Review the Use ECC Conflict Checker section for more information.

If the ECC Conflict Checker reveals a conflict between your Third Party template and ECC templates, you need to compare your theme templates code to ECC templates code and add ECC modifications to your templates.

19.1 Use ECC Conflict Checker

Use these stepf to verify if your theme template conflicts with ECC templates. You need to verify this if you use any other template than ECC Flexi Theme.

Menu Path: Admin Panel > Epicor > ECC Conflict Checker > Template

1. The Templates list displays the following conflict details:
   - Layout XML file
   - Page Handle
   - Reference
   - Set In
   - Expected Template
   - Used Template

2. Review the details and fix the inconsistencies as required.

Chapter 20: Content Management System

Use the Content Management System (CMS) option to create additional static data to for the ECC site. For example, you can add such pages as About Us, Contact Information, 404 Not Found and so on.

20.1 Add CMS Pages

Use these steps to create a new page for your site.

Menu Path: Admin Panel > CMS > Pages

1. Click the **Add New Page** button at the top of the page.
2. Enter the **Page Title**. For example, enter About Us.
3. In the **URL Key** field, enter a relative key to the base site URL for the new page.
4. Select a **Store View** in which you want to use the page.
5. In the Status field, select **Enabled**.
6. In the **Page Information** pane, click **Content**.
7. Enter **Content Heading** if required.
8. Use the WYSYWIG editor to create and format the page content. You can use the editor to insert such content elements as Variables, Widgets, Images, Video and so on. When you click the element icon, the system opens the window where you need to enter the element details.
9. In the **Page Information** pane, click **Design**.
10. In the **Layout** field select the type of layout you want to use in the new page. You can also define Custom Design for the page.
11. Optionally, navigate to **Meta Data** sheet to enter **Keywords** and **Description** for the page.
12. Click the **Save Page** button at the top.

Reset Theme for Default Store

When you install ECC on existing Magento environment, the default store theme changes to Flexi Theme. If you want to continue using a theme you had previously, you need to reset the Default Package Name value.

Menu Path: Admin Panel > System > Configuration

1. From the **Current Configuration Scope** drop-down, select **Default Store View**.
2. In the **Configuration** pane, under the **General** title, click **Design**.
3. In the **Current Package Name** field, enter the name of the package you want to use for default store.

4. Click the **Save Config** button.

Part VII: Appendix 1: Epicor ERP Messaging Structure

This appendix contains technical details on the ECC to Epicor ERP messaging structure. Use it to view what kind of data is communicated between ECC and Epicor ERP in each message. For more information on messaging, review the Messaging section in this guide.

ALT Message

Element Tag	Epicor ERP 10
products->product->productCode	PartSubs.SubPart
products->product->type	PartSubs.SubType - conditional

CAD Message

Element Tag	Epicor ERP 10
accountNumber	ShipTo.CustNum
address + type	D
address->addressCode	ShipTo.ShiptoNum
address->name	ShipTo.Name
address->address1	ShipTo.Address1
address->address2	ShipTo.Address2
address->address3	ShipTo.Address3
address->city	ShipTo.City
address->county	ShipTo.State
address->country	ShipTo.Country
address->postcode	ShipTo.Zip
address->telephoneNumber	ShipTo.PhoneNum
address->faxNumber	ShipTo.FaxNum

CPN Message

Element Tag	Epicor ERP 10
accountNumber	CustXPrt.CustNum
productCode	CustXPrt.PartNum
customerPart>productCode	CustXPrt.XPartNum
customerPart->description	CustXPrt.PartDescription

CUS Message

Element Tag	Epicor ERP 10
accountNumber	Customer.CustNum
accountId	Customer.CustID
accountName	Customer.Name
allowBackOrders	Customer.ShippingQualifier
account + onStop	Customer.CreditHold
account->balance	Customer.TotInvoiceCredit
account->creditLimit	Customer.CreditLimit
account-> unallocatedCash	Customer.TotOpenPI
account-> baseCurrencyCode	Customer.CurrencyCode
account->emailAddress	Customer.EmailAddress
account->salesRep	Customer.SalesRepCode
account->currencies	Currency.CurrencyCode **Note** One for each reporting currency.
taxCode	Customer.TaxRegionCode
defaults->registeredAddress->addressCode	Customer.CustNum + RG
defaults->registeredAddress->name	Customer.Name
defaults->registeredAddress->address1	Customer.Address1
defaults->registeredAddress->address2	Customer.Address2
defaults->registeredAddress->address3	Customer.Address3
defaults->registeredAddress->city	Customer.City
defaults->registeredAddress->county	Customer.State

Element Tag	Epicor ERP 10
defaults->registeredAddress->country	Customer.Country
defaults->registeredAddress->postcode	Customer.Zip
defaults->registeredAddress->telephoneNumber	Customer.PhoneNum
defaults->registeredAddress->faxNumber	Customer.FaxNum
defaults->invoiceAddress->addressCode	Customer.CustNum + BT
defaults->invoiceAddress->name	Customer.BTName
defaults->invoiceAddress->address1	Customer.BTAddress1
defaults->invoiceAddress->address2	Customer.BTAddress2
defaults->invoiceAddress->address3	Customer.BTAddress3
defaults->invoiceAddress->city	Customer.BTCity
defaults->invoiceAddress->county	Customer.BTState
defaults->invoiceAddress->country	Customer.BTCountry
defaults->invoiceAddress->postcode	Customer.BTZip
defaults->invoiceAddress->telephoneNumber	Customer.BTPhoneNum
defaults->invoiceAddress->faxNumber	Customer.BTFaxNum
defaults->deliveryAddress->addressCode	ShipTo.ShiptoNum + ST **Note** Based on Primary Ship To
defaults->deliveryAddress->name	ShipTo.Name
defaults->deliveryAddress->address1	ShipTo.Address1
defaults->deliveryAddress->address2	ShipTo.Address2
defaults->deliveryAddress->address3	ShipTo.Address3
defaults->deliveryAddress->city	ShipTo.City
defaults->deliveryAddress->county	ShipTo.State
defaults->deliveryAddress->country	ShipTo.Country
defaults->deliveryAddress->postcode	ShipTo.Zip
defaults->deliveryAddress->telephoneNumber	ShipTo.PhoneNum
defaults->deliveryAddress->faxNumber	ShipTo.FaxNum

CXR Message

Element Tag	Epicor ERP 10
fromCurrency	CurrExRate.SourceCurrCode

Element Tag	Epicor ERP 10
toCurrency	CurrExRate.TargetCurrCode
rate	CurrExRate.CurrentRate

SGP Message

Element Tag	Epicor ERP 10
productCode	Part.PartNum
productGroups->productGroup	Part.ProdCode

SOU Message

Element Tag	Epicor ERP 10
accountNumber	OrderHed.CustNum
orderNumber	OrderHed.OrderNum
orderReference	OrderHed.ECCOrderNum
statusCode	Shipped, Invoiced, Closed, OnHold, Complete
dispatch->payment ->currencyCode	InvcHead.CurrencyCode
dispatch->payment ->goodsTotal	total from InvcDtl.DocExtPrice
dispatch->payment ->goodsTotalInc	total from InvcDtl.DspDocLineTax
dispatch->payment ->discountAmount	-InvcMisc.DspDocMiscAmt
dispatch->payment ->carriageAmount	InvcMisc.DspDocMiscAmt
dispatch->payment ->carriageAmountInc	InvcMisc.DspDocMiscAmt + taxAmount
dispatch->payment ->grandTotal	InvcHead.DspDocSubTotal
dispatch->payment ->grandTotalInc	InvcHead.DocInvoiceAmt - DocPayDiscAmt
dispatch->payment ->shipmentNumber	ShipHead.PackNum
dispatch->payment ->invoiceNumber	InvcHead.InvoiceNum
dispatch->lines->line->productCode	InvcDtl.PartNum
dispatch->lines->line->unitOfMeasureCode	InvcDtl.SalesUM
dispatch->lines->line->quantity	InvcDtl.DspSellingShipQty
dispatch->lines->line->price	InvcDtl.DocUnitPrice
dispatch->lines->line->priceInc	InvcDtl.DspDocLineTotal - DspDocTotalMiscChrg
dispatch->lines->line->lineValue	InvcDtl.DocExtPrice

Element Tag	Epicor ERP 10
dispatch->lines->line->lineValueInc	InvcDtl.DspDocLineTotal - DspDocTotalMiscChrg
dispatch->lines->line->trackingNumber	ShipHead.TrackingNumber
dispatch->lines->line->taxCode	InvcDtl.TaxRegionCode
dispatch->lines->line->dateRequired	OrderDtl.NeedByDate

STG Message

Element Tag	Epicor ERP 10
groupCode	ProdGrup.ProdCode
languages->language->languageCode	LangName.LangNameID
languages->language->shortDescription	translated description
languages->language->fullDescription	translated description

STK Message

Element Tag	Epicor ERP 10
productCode	Part.PartNum
title	Part.PartDescription
shortDescription	Part.PartDescription
freeStock	calculated
currency->currencyCode	Currency.CurrencyCode
currency->basePrice	calculated **Note** One for each reporting currency.
UOMSalesDescription	UOM.UOMDesc
images->image + number	1 **Note** Only if Imagefilename has value - for Epicor ERP 9 conversion.
images->image + type	LTS
images->image->filename	Part.ImageFileName
images->image->description	Part.ImageFileName
weight	Part.GrossWeight

Element Tag	Epicor ERP 10
leadTime->days	PartPlant.LeadTime
leadTime->text	PartPlant.LeadTime
description	LangName.Description
manufacturers->manufacturer->name	Manufacturer.Name
manufacturers->manufacturer->productCode	PartXRefMfg.MfgPartNum
unitofMeasures->unitofMeasure->description	UOM.UOMDesc
unitofMeasures ->unitofMeasure->code	UOM.UOMCode
unitofMeasures ->unitofMeasure->weight	calculated
unitofMeasures->unitofMeasure->attributes->attribute->code	PartPC.Type (for UPC, EAN)
unitofMeasures->unitofMeasure->attributes->attribute->description	PartPC.Type
unitofMeasures->unitofMeasure->attributes->attribute->value	PartPC.ProdCode
-> unitofMeasures ->unitofMeasure->currencies->currencyCode	Currency.CurrencyCode
unitofMeasures ->unitofMeasure->currencies->basePrice	calculated **Note** One for each reporting currency.
explodedParts->explodedPart->productCode	PartMtl.MtlPartNum
explodedParts->explodedPart->unitOfMeasureCode	PartMtl.UOMCode
explodedParts->explodedPart->quantity	PartMtl.QtyPer
explodedParts->explodedPart->description	Part.PartDescription

STT Message

Element Tag	Epicor ERP 10
product->productCode	Part.PartNum
product->languages->language->languageCode	LangName.LangNameID
product->languages->language->shortText	LangName.Description
product-> languages->language->description	LangName.Description
product->languages->language->title	Part.PartDescription

ALT Message

Element Tag	Epicor ERP 10
products->product->productCode	PartSubs.SubPart
products->product->type	PartSubs.SubType - conditional

CAD Message

Element Tag	Epicor ERP 10
accountNumber	ShipTo.CustNum
address + type	D
address->addressCode	ShipTo.ShiptoNum
address->name	ShipTo.Name
address->address1	ShipTo.Address1
address->address2	ShipTo.Address2
address->address3	ShipTo.Address3
address->city	ShipTo.City
address->county	ShipTo.State
address->country	ShipTo.Country
address->postcode	ShipTo.Zip
address->telephoneNumber	ShipTo.PhoneNum
address->faxNumber	ShipTo.FaxNum

CPN Message

Element Tag	Epicor ERP 10
accountNumber	CustXPrt.CustNum
productCode	CustXPrt.PartNum
customerPart>productCode	CustXPrt.XPartNum
customerPart->description	CustXPrt.PartDescription

CUS Message

Element Tag	Epicor ERP 10
accountNumber	Customer.CustNum
accountId	Customer.CustID
accountName	Customer.Name
allowBackOrders	Customer.ShippingQualifier
account + onStop	Customer.CreditHold
account->balance	Customer.TotInvoiceCredit
account->creditLimit	Customer.CreditLimit
account-> unallocatedCash	Customer.TotOpenPI
account-> baseCurrencyCode	Customer.CurrencyCode
account->emailAddress	Customer.EmailAddress
account->salesRep	Customer.SalesRepCode
account->currencies	Currency.CurrencyCode **Note** One for each reporting currency.
taxCode	Customer.TaxRegionCode
defaults->registeredAddress->addressCode	Customer.CustNum + RG
defaults->registeredAddress->name	Customer.Name
defaults->registeredAddress->address1	Customer.Address1
defaults->registeredAddress->address2	Customer.Address2
defaults->registeredAddress->address3	Customer.Address3
defaults->registeredAddress->city	Customer.City
defaults->registeredAddress->county	Customer.State
defaults->registeredAddress->country	Customer.Country
defaults->registeredAddress->postcode	Customer.Zip
defaults->registeredAddress->telephoneNumber	Customer.PhoneNum
defaults->registeredAddress->faxNumber	Customer.FaxNum
defaults->invoiceAddress->addressCode	Customer.CustNum + BT
defaults->invoiceAddress->name	Customer.BTName
defaults->invoiceAddress->address1	Customer.BTAddress1
defaults->invoiceAddress->address2	Customer.BTAddress2
defaults->invoiceAddress->address3	Customer.BTAddress3

Element Tag	Epicor ERP 10
defaults->invoiceAddress->city	Customer.BTCity
defaults->invoiceAddress->county	Customer.BTState
defaults->invoiceAddress->country	Customer.BTCountry
defaults->invoiceAddress->postcode	Customer.BTZip
defaults->invoiceAddress->telephoneNumber	Customer.BTPhoneNum
defaults->invoiceAddress->faxNumber	Customer.BTFaxNum
defaults->deliveryAddress->addressCode	ShipTo.ShiptoNum + ST **Note** Based on Primary Ship To
defaults->deliveryAddress->name	ShipTo.Name
defaults->deliveryAddress->address1	ShipTo.Address1
defaults->deliveryAddress->address2	ShipTo.Address2
defaults->deliveryAddress->address3	ShipTo.Address3
defaults->deliveryAddress->city	ShipTo.City
defaults->deliveryAddress->county	ShipTo.State
defaults->deliveryAddress->country	ShipTo.Country
defaults->deliveryAddress->postcode	ShipTo.Zip
defaults->deliveryAddress->telephoneNumber	ShipTo.PhoneNum
defaults->deliveryAddress->faxNumber	ShipTo.FaxNum

CXR Message

Element Tag	Epicor ERP 10
fromCurrency	CurrExRate.SourceCurrCode
toCurrency	CurrExRate.TargetCurrCode
rate	CurrExRate.CurrentRate

SGP Message

Element Tag	Epicor ERP 10
productCode	Part.PartNum
productGroups->productGroup	Part.ProdCode

SOU Message

Element Tag	Epicor ERP 10
accountNumber	OrderHed.CustNum
orderNumber	OrderHed.OrderNum
orderReference	OrderHed.ECCOrderNum
statusCode	Shipped, Invoiced, Closed, OnHold, Complete
dispatch->payment ->currencyCode	InvcHead.CurrencyCode
dispatch->payment ->goodsTotal	total from InvcDtl.DocExtPrice
dispatch->payment ->goodsTotalInc	total from InvcDtl.DspDocLineTax
dispatch->payment ->discountAmount	-InvcMisc.DspDocMiscAmt
dispatch->payment ->carriageAmount	InvcMisc.DspDocMiscAmt
dispatch->payment ->carriageAmountInc	InvcMisc.DspDocMiscAmt + taxAmount
dispatch->payment ->grandTotal	InvcHead.DspDocSubTotal
dispatch->payment ->grandTotalInc	InvcHead.DocInvoiceAmt - DocPayDiscAmt
dispatch->payment ->shipmentNumber	ShipHead.PackNum
dispatch->payment ->invoiceNumber	InvcHead.InvoiceNum
dispatch->lines->line->productCode	InvcDtl.PartNum
dispatch->lines->line->unitOfMeasureCode	InvcDtl.SalesUM
dispatch->lines->line->quantity	InvcDtl.DspSellingShipQty
dispatch->lines->line->price	InvcDtl.DocUnitPrice
dispatch->lines->line->priceInc	InvcDtl.DspDocLineTotal - DspDocTotalMiscChrg
dispatch->lines->line->lineValue	InvcDtl.DocExtPrice
dispatch->lines->line->lineValueInc	InvcDtl.DspDocLineTotal - DspDocTotalMiscChrg
dispatch->lines->line->trackingNumber	ShipHead.TrackingNumber
dispatch->lines->line->taxCode	InvcDtl.TaxRegionCode
dispatch->lines->line->dateRequired	OrderDtl.NeedByDate

STG Message

Element Tag	Epicor ERP 10
groupCode	ProdGrup.ProdCode
languages->language->languageCode	LangName.LangNameID

Element Tag	Epicor ERP 10
languages->language->shortDescription	translated description
languages->language->fullDescription	translated description

STK Message

Element Tag	Epicor ERP 10
productCode	Part.PartNum
title	Part.PartDescription
shortDescription	Part.PartDescription
freeStock	calculated
currency->currencyCode	Currency.CurrencyCode
currency->basePrice	calculated **Note** One for each reporting currency.
UOMSalesDescription	UOM.UOMDesc
images->image + number	1 **Note** Only if Imagefilename has value - for Epicor ERP 9 conversion.
images->image + type	LTS
images->image->filename	Part.ImageFileName
images->image->description	Part.ImageFileName
weight	Part.GrossWeight
leadTime->days	PartPlant.LeadTime
leadTime->text	PartPlant.LeadTime
description	LangName.Description
manufacturers->manufacturer->name	Manufacturer.Name
manufacturers->manufacturer->productCode	PartXRefMfg.MfgPartNum
unitofMeasures->unitofMeasure->description	UOM.UOMDesc
unitofMeasures ->unitofMeasure->code	UOM.UOMCode
unitofMeasures ->unitofMeasure->weight	calculated
unitofMeasures->unitofMeasure->attributes->attribute->code	PartPC.Type (for UPC, EAN)
unitofMeasures->unitofMeasure->attributes->attribute->description	PartPC.Type
unitofMeasures->unitofMeasure->attributes->attribute->value	PartPC.ProdCode

Element Tag	Epicor ERP 10
-> unitofMeasures ->unitofMeasure->currencies->currencyCode	Currency.CurrencyCode
unitofMeasures ->unitofMeasure->currencies->basePrice	calculated **Note** One for each reporting currency.
explodedParts->explodedPart->productCode	PartMtl.MtlPartNum
explodedParts->explodedPart->unitOfMeasureCode	PartMtl.UOMCode
explodedParts->explodedPart->quantity	PartMtl.QtyPer
explodedParts->explodedPart->description	Part.PartDescription

STT Message

Element Tag	Epicor ERP 10
product->productCode	Part.PartNum
product->languages->language->languageCode	LangName.LangNameID
product->languages->language->shortText	LangName.Description
product-> languages->language->description	LangName.Description
product->languages->language->title	Part.PartDescription

Part VIII: Appendix 2: Prophet 21 Implementation Notes

Use this section to review Prophet 21 integration settings for your ECC installation.

Chapter 21: Quick Start Initial Settings

Use this section to establish the network connection between Prophet 21 and Epicor Commerce Connect and assign a license to use for your ECC installation.

21.1 Quick Start - General

Use these steps to define Quick Start General settings.

Menu Path: Admin Panel > Epicor > Quick Start

1. In the **System** field, select **p21**.
2. Define Networking Settings:
   a. In the **Site Name** field, enter a name for your site or accept the default value.
   b. In the **ERP URL** field, enter **http://yourApiServer:3080/api/ECC/dispatch/** where **yourApiServer** is the actual name (or IP address) of the machine running IIS serving P21 API. Note that the port number may not be 3080. That is the default port named at installation time, but it can be changed. The api/ECC/dispatch/ part of the URL is the same for everyone.
   c. In the **Username** field, specify the user that will be used to connect to the Prophet 21 API and also the underlying Prophet 21 database. It may not be admin. That is used for almost all inhouse installations, but customers may have another designated account.
   d. In the **Password/Consumer Key** field, enter a consumer key you generated on P21 API web site. Use the steps from Appendix 2: Configure ECC with Prophet 21 in ECC Installation Guide to generate this key.
   e. **P21 Token Url** is where ECC will go to get the authentication token. In this field, enter **http://yourApiServer:3080/api/security/token** where **yourApiServer** and port number must be replaced with the values for this customer. The api/security/token part is the same for everyone.
   f. Click the **Get P21 Token** button. If this part of communication is working, you will get the "Token retrieved successfully" message. If not, most likely there was a typo in the consumer key. You may have an extra space at the beginning or end.
   g. **Default Company** should be set to the company code using the site. **T** is the common company code found in inhouse databases.
   h. Click the **Test Network Connection** button to verify the network settings are correct. If the settings are correct, you will get the "Successful Connection" message.
   i. Click the **Save** button at the top of the page.

3. Define Licensing Settings:

a. Click **Browse** to select a license file.

b. The **Current License Accessibility** list displays the licensed ECC modules.

c. Click the **Save** button.

Chapter 22: Customer Synchronization

Use this section to transfer your Prophet 21 customer data to Epicor Commerce Connect.

22.1 Canadian Addresses

When customer addresses are imported into ECC, the state codes (PA, NJ and so on) must be valid. If an address is in Canada and a Canadian state code is used, but the country is not set in Prophet 21, that address import fails because the system defaults blank country fields to USA.

To avoid this issue, you need to verify that all addresses with Canadian state codes have the Country field filled in. You can run the following SQL script for this:

```
UPDATE address
SET    mail_country = 'CANADA'
WHERE  mail_state IN ( 'AB', 'BC', 'MB', 'NB',
                       'NL', 'NS', 'NT', 'NU',
                       'ON', 'PE', 'QC', 'SK', 'YT' )
       AND COALESCE(mail_country, '') = ''
```

22.2 Run Customer Synchronization

Use these steps to run customer synchronization.

Menu Path: Admin Panel > Epicor > Messaging > Send SYN Request

1. In the **Store** field, select **Main Site**.
2. In the **Upload Messages** field, select **Customers**.
3. In the **Language** field, select the available languages.
4. Click the **Send SYN** button at the top of the page.

Chapter 23: Quick Start Mapping Settings

Use this section to define data mapping between Prophet 21 and Epicor Commerce Connect.

23.1 Quick Start - Customer Settings

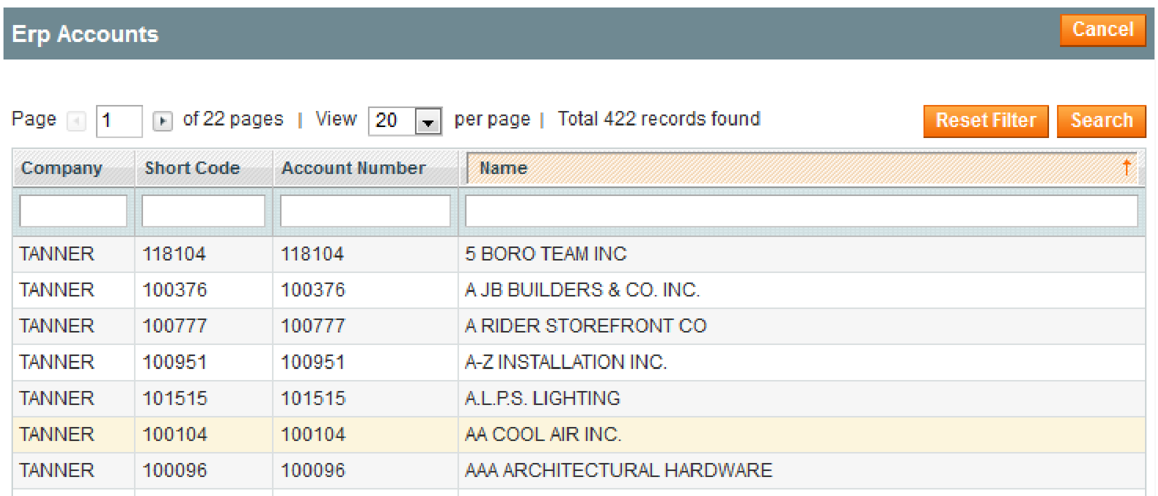
Use this section to define Customer Settings in Epicor Quick Start.

Menu Path: Admin Panel > Epicor > Quick Start

1. In the **Quick Start** pane, select **Customer Settings**.

2. In the **Default ERP Code**, ente a Prophet 21 ERP account code you want to use as default for the site. Click the **Select** button. The system displays the name of the customer you entered.

   To view the available ERP accounts, navigate to Admin Panel > Customers > ERP Accounts. Your screen may look similar to the following:



Company	Short Code	Account Number	Name
TANNER	118104	118104	5 BORO TEAM INC
TANNER	100376	100376	A JB BUILDERS & CO. INC.
TANNER	100777	100777	A RIDER STOREFRONT CO
TANNER	100951	100951	A-Z INSTALLATION INC.
TANNER	101515	101515	A.L.P.S. LIGHTING
TANNER	100104	100104	AA COOL AIR INC.
TANNER	100096	100096	AAA ARCHITECTURAL HARDWARE

   ERP Code defines default web prices displayed on the website.

   - For a **Consumer** site, the default ERP account code is used to record all website transactions performed by consumers. This account has a defined credit limit.
   - For a **Customer** site, this account is only used to display default prices when the customers are not logged in. To see actual prices and place orders, the customers must log in to the site using their ECC credentials.
   - For a **mixed Consumer/Customer** environment, the default ERP account is used for consumers' web transactions. To see actual prices and place orders, the customers must log in to the site using their ECC credentials.

3. Select a **Default Country** for addresses.

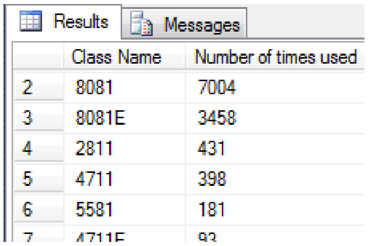
4. Click the **Add** button to create **Customer Tax Classes** records in ECC. These must be the same customer tax classes you use in Prophet 21.

   To search for your Tax Classes, use the following query in SQL that hosts your database:

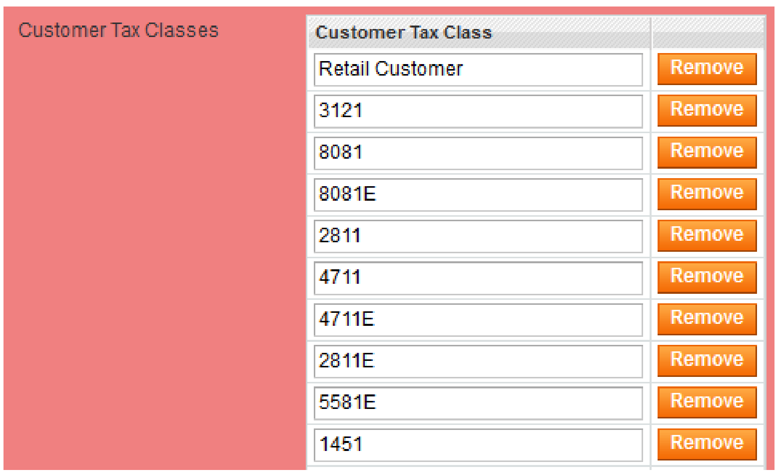
```
SELECT
    tax_group_id        AS "Class Name",
```

```
  count(tax_group_id) AS "Number of times used"
FROM ship_to
GROUP BY tax_group_id
ORDER BY "Number of times used" DESC
```

Your query results may look similar to the following (the **Number of times used** column is for your reference only):



Use these values to populate the Customer Tax Classes fields. Your screen may look similar to the following:



5. In the **Default Tax Code** drop-down list, select a tax code to use for transactions if specific tax code is not assigned to a customer in Prophet 21. You may need to select the Tax Class which has the maximum value in the **Number of times used** column of the SQL query results.

6. Define **Country Mapping**. Click the **Add** button to add a new **ERP Code** for the country. This code must be the same as you use in Prophet 21. From the drop-down to the right, select a referring **Magento Country**. Add as many country codes as you use in Prophet 21.

To search for your Country Codes, use the following query in your SQL that hosts your database:

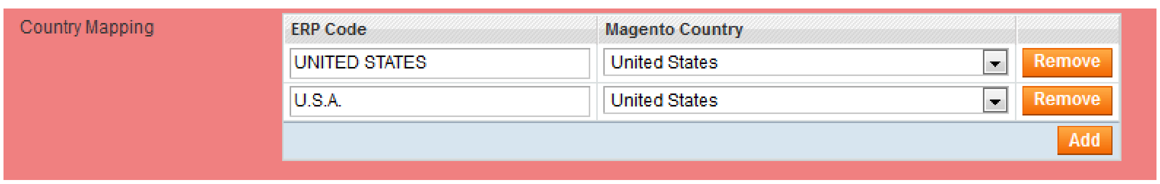
```
select distinct phys_country
from address
order by phys_country
```

Your query results may look similar to the following:

Results | Messages

	phys_country
1	NULL
2	
3	INDIA
4	1(504)-2565-8882
5	1-631-385-7273
6	ACCT #266686
7	AM#3727-1606-3521-000 11/06
8	AUSTRALIA
9	BERMUDA
10	BRAZIL
11	CA
12	CAN

You may find some incorrect data that can be ignored. For example, someone put a phone number in the country field. Use the correct values to populate the Country Mapping fields. Your screen may look similar to the following:



7. Define **Currency Mapping**. Click the **Add** button to add a new **ERP Code** for the currency. This code must be the same as you use in Prophet 21. From the drop-down to the right, select a referring **Country**. Add as many currency codes as you use in your Prophet 21.

   To search for your Country Codes, use the following query in your SQL that hosts your database:

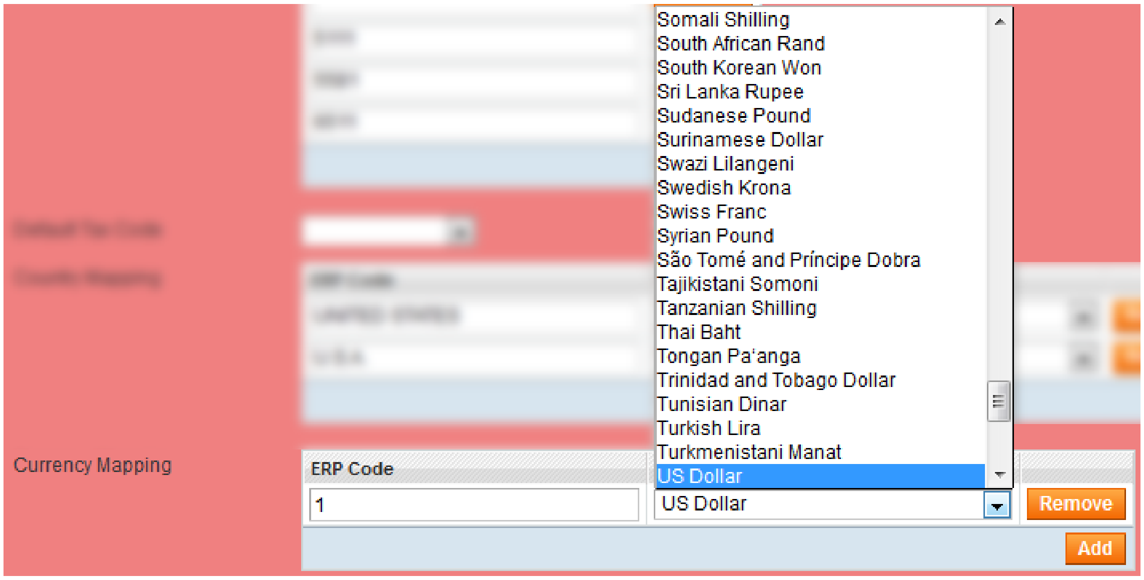
```
select distinct currency_id, currency_desc
from currency_hdr
```

Your query results may look similar to the following:

Results | Messages

	currency_id	currency_desc
1	1	U.S. Dollars

Use these values to populate the Currency Mapping fields. Your screen may look similar to the following:



8. When complete, click the **Save** button at the top. The system displays the General screen. Go back to Customer Settings to verify the screen turned to green. If the screen is red, the settings may be incorrect or incomplete.

23.2 Quick Start - Products/Configurator Settings

Use this section to define Customer Settings in Epicor Quick Start.

Menu Path: Admin Panel > Epicor > Quick Start

1. In the **Quick Start** pane, select **Products/Configurator Settings**.

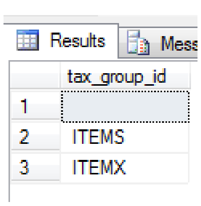
2. Optionally, use the **UOM Filter** field to define the UOMs you do not want to sell across the site for all products. You can leave this firld blank is your UOM filters are defined in Prophet 21.

3. Define **Product Tax Classes**. You can leave the default **Taxable Goods** and **Shipping** values. Click the **Add** button to add product tax classes you want to use in ECC. These must be the same product classes you use in your Prophet 21.

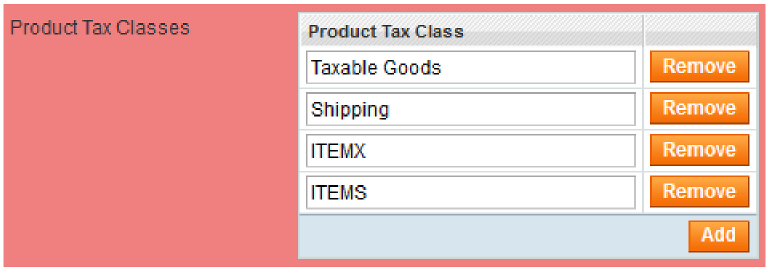
   To search for your Product Tax Classes, use the following query in SQL that hosts your database:

```
SELECT DISTINCT tax_group_id
FROM inv_loc
```

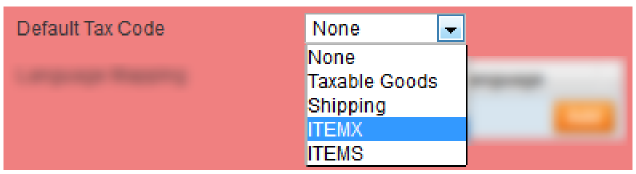
   Your query results may look similar to the following:



Use these values to populate the Product Tax Classes fields. Your screen may look similar to the following:



4. In the **Default Tax Code** drop-down list, select a tax to use for transactions if specific tax code is not assigned to the product in Prophet 21. Your screen may look similar to the following:

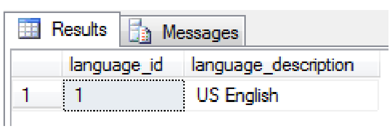


5. Define **Language Mapping**. Click the **Add** button to add a new **ERP Code** for the language. This code must be the same as you use in Prophet 21. From the drop-down to the right, select a referring **Language**. Add as many languages as you use in Prophet 21.

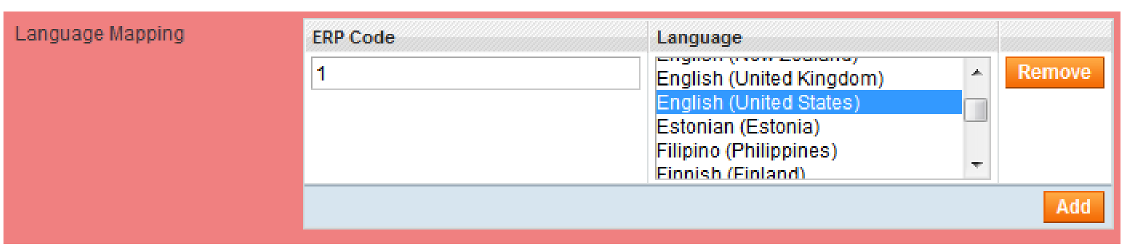
   To search for your Languages, use the following query in SQL that hosts your database:

```
select language_id, language_description from language
```

   Your query results may look similar to the following:



   Use these values to populate the Language Mapping fields. Your screen may look similar to the following:



6. When complete, click the **Save** button at the top. The system displays the General screen. Go back to Products/Configurator Settings to verify the screen turned to green. If the screen is red, the settings may be incorrect or incomplete.

23.3 Quick Start - Checkout Settings

Use this section to define Customer Settings in Epicor Quick Start.

Menu Path: Admin Panel > Epicor > Quick Start

1. In the **Quick Start** pane, select **Checkout Settings**.

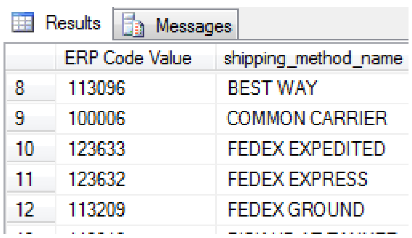
2. Enter an **ERP Order Reference Prefix**. This configuration option allows you to specify a prefix for all web orders. Orders placed via ECC have an ECC order reference. This allows orders to be tracked on ECC even when the system is offline. This order reference is sent to your ERP when an order is placed.

3. Define **Shipping Method Mapping**. Click the **Add** button to add a new **ERP Code** for the shipping method. This code must be the same as you use in Prophet 21. From the drop-down to the right, select a referring ECC **Shipping Method**. Add as many shipping methods as you use in Prophet 21.

   To search for your Shipping Methods, use the following query in SQL that hosts your database:

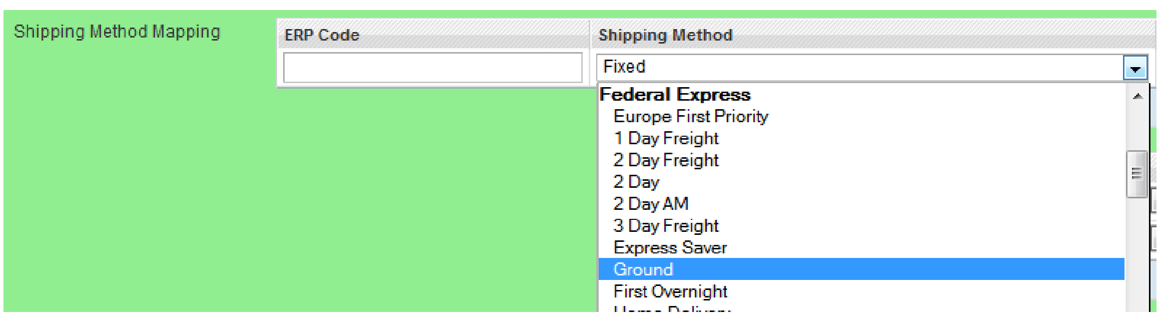
```
SELECT
   CAST(address.[id] AS VARCHAR(10))             AS "ERP Code Value",
   CAST(LEFT(address.[name], 40) AS VARCHAR(40)) AS shipping_method_name
FROM   address WITH (nolock)
WHERE  carrier_flag = 'Y' AND
       address.delete_flag = 'N'
```

   Your query results may look similar to the following:

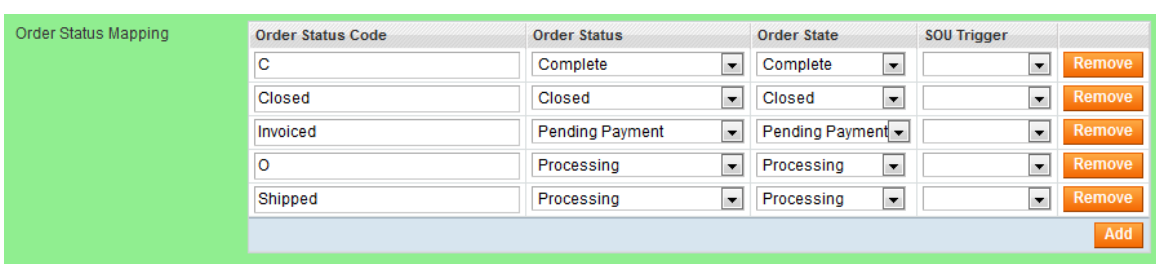


	ERP Code Value	shipping_method_name
8	113096	BEST WAY
9	100006	COMMON CARRIER
10	123633	FEDEX EXPEDITED
11	123632	FEDEX EXPRESS
12	113209	FEDEX GROUND

   Populate the Shipping Methods fields with the methods you want to use for your e-commerce site. In this example, we add the Fedex Ground method. Your screen may look similar to the following:

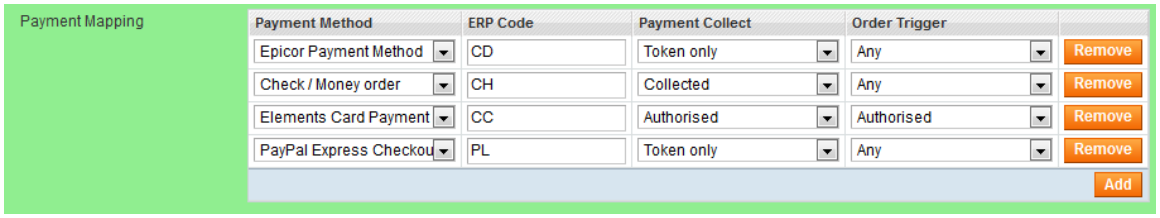


4. Define **Order Status Mapping**. Click the **Add** button to add a new **Order Status Code** . Use the following settings:



Order Status Code	Order Status	Order State	SOU Trigger	
C	Complete	Complete		Remove
Closed	Closed	Closed		Remove
Invoiced	Pending Payment	Pending Payment		Remove
O	Processing	Processing		Remove
Shipped	Processing	Processing		Remove
				Add

5. Define **Payment Mapping**. Click the **Add** button to add a new **Payment Method** and enter a referring **ERP Code**. Use the following settings:



6. When complete, click the **Save** button at the top. The system displays the General screen. Go back to Checkout Settings to verify the screen turned to green. If the screen is red, the settings may be incorrect or incomplete.

Chapter 24: Additional Settings

Use this section to perform additional settings required to configure ECC to work with Prophet 21.

24.1 Timeout Settings

Use these steps to change default timeout settings in ECC.

Menu Path: Admin Panel > System > Configuration

1. Under the Epicor Configuration title, select **Netwoking and General**.
2. Expand the **Networking** section.
3. In the **Timeout** field, enter **60**.
4. Click the **Save Config** button at the top of the page.

24.2 Card Type Mapping

Use these steps to define Card Type mapping settings.

Menu Path: Admin Panel > Epicor > Mapping > Card Type

1. In SQL that hosts your Prophet 21 database, enter the following query:

```
select distinct UPPER(payment_type_desc)
from p21_view_payment_types
```

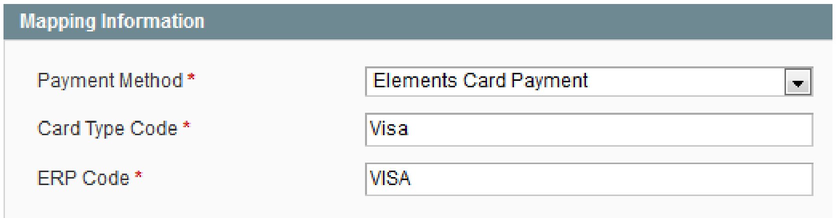
Your query results may look similar to the following:

Results | Messages

	(No column name)
1	ACH WIRE TRANSFER
2	AMERICAN EXPRESS
3	CASH
4	CHECK
5	DISCOVER
6	MASTERCARD
7	PAYPAL PAYMENT
8	VISA

2. On the Card Type Mapping screen, click the **Add Mapping** button at the top of the page.
3. In the **Payment Method** field, select a payment method that you want to use for the card type you are going to use.
4. In the **Card Type Code** field, enter a code to use for this card in ECC.
5. In the **ERP Code** field, enter a code that is used for this card type in ECC.

Your screen may look similar to the following:



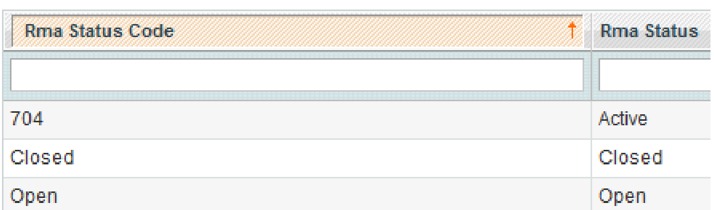
6. Click the **Save** button at the top. The new card type is added to the list. Add as many types as you want to use for your e-commerce site.

24.3 RMA Mapping

Use these steps to define RMA mapping settings.

Menu Path: Admin Panel > Epicor > Mapping > Rma

1. Click the **Add Mapping** button at the top of the page.
2. In the **Code** field, enter **704**.
3. In the **Rma Status** field, enter **Active**.
4. Click the **Save** button at the top of the page. The new RMA is added to the list. Your screen may look similar to the following:



Rma Status Code	Rma Status
704	Active
Closed	Closed
Open	Open

24.4 Enable Logging

By default, not all messages going between Prophet 21 and ECC are logged. Use these steps to enable logging for the messages.

Menu Path: Admin Panel > Epicor > Messaging > Logging Config

1. Expand the **Commerce Connect**, **Customer Connect** and **Supplier Connect** (if used) sections.
2. Review the messages and their logging statuses.
3. Select the **Enabled** value for the messages you need to be included in logging if they are disabled.

24.5 Global Options for Request Messages

Use these steps do define global options for Prophet 21 Request Messages.

Menu Path: Admin Panel > Epicor > Messaging > Request Messages

1. Expand the **Global Options** section.
2. Set the **Default ERP Delivery Code** to the value that is used in Prophet 21 on the Carrier Maintenance screen.
3. In the **Default ERP Address Code** field, enter **000**.
4. In the **Default ERP Address Country** field, select **United States**.
5. Set the **Send State/County/Province Name if Available** field to **No**.
6. Click the **Save Config** button at the top of the page.

24.6 Disable DDA Message

The Delivery Date Availability (DDA) message is not applicable to Prophet 21. You must disable it for the shopper to be able to get past the freight step when making an order.

Menu Path: Admin Panel > Epicor > Messaging > Request Messages

1. Expand the **DDA Delivery Date Availability** section.
2. Set the Enabled field to No.
3. Click the **Save Config** button at the top of the page.

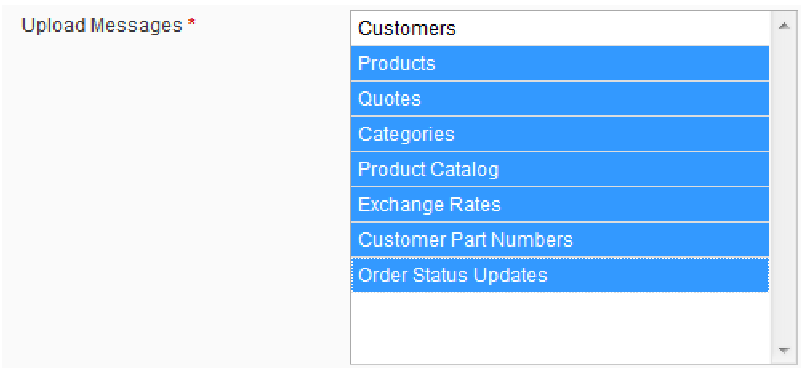
Chapter 25: Run Data Synchronization

Use these steps to synchronize Prophet 21 data with ECC.

Menu Path: Admin Panel > Epicor > Messaging > Send SYN Request

1. In the **Store** field, select **Main Site**.

2. In the **Upload Messages** field, select all items except for Customers. To select multiple items, use **Ctrl+Click**. Your screen may look similar to the following:



3. In the **Language** field, select the available languages.

4. Click the **Send SYN** button at the top of the page.

25.1 Rebuild Indices

When data synchronization is complete, you need to rebuild the indices.

Menu Path: Admin Panel > System > Index Management

1. In the **Index Management** toolbar, click **Select All**.

2. From the **Actions** drop-down, select **Reindex Data**.

3. Click **Sumbit**.

Additional information is available at the Education and Documentation areas of the EPICweb Customer Portal. To access this site, you need a Site ID and an EPICweb account. To create an account, go to http://support.epicor.com.